

Chapter 8

Job Cards

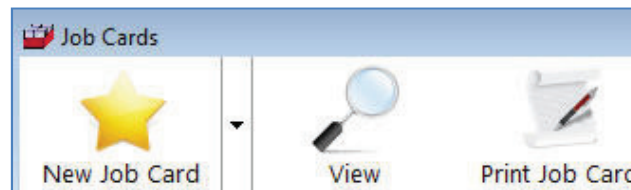
Create a New Job Card

Click **Job Cards** at top bar of buttons on main screen.



Job Cards Section

To enter a new Job Card on the system, click **New** from the Job Card section.



New Job Card

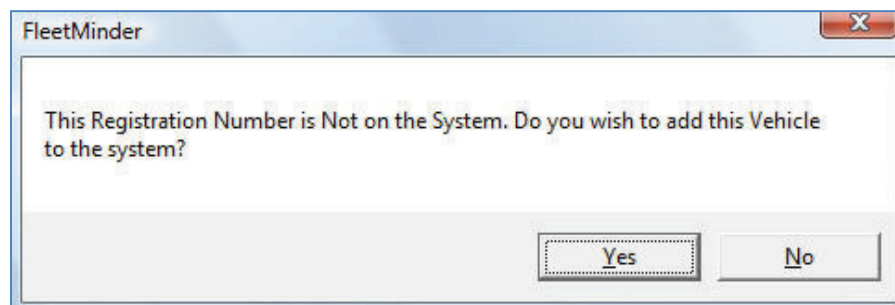
This will bring you to the Job Card setup screen.

The screenshot displays the 'New Job Card' setup form. It has a 'Job Header' section with multiple input fields arranged in a grid. The fields include: 'Registration No.' (containing '93D3503'), 'Make', 'Body Type', 'Veh Catg', 'Engine No.', 'Model', 'Stock No', 'VIN No.', 'Mileage / KM', 'Year of Manu', 'Yr1st Reg', 'Customer Ref', 'Fleet No.', 'Axles', 'Completion Date', 'SONO', 'Business Type', and 'Select Vehicle Depot'. At the bottom right of the form are 'Cancel' and 'Continue' buttons.

New Job Card

Type in the *Registration No.* of the vehicle and press **Enter**.

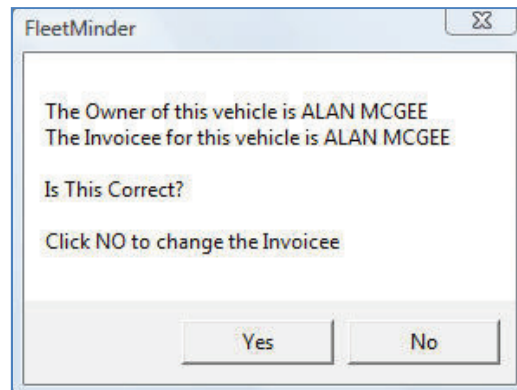
If the vehicle is not known to FleetMinder then you will be prompted to add the vehicle using the *Vehicle Wizard*.



Registration not on FleetMinder

If the vehicle is known to FleetMinder then its details will automatically be taken from the database.

You will be prompted to check whether the *Owner* and *Invoicee* details are correct before starting.

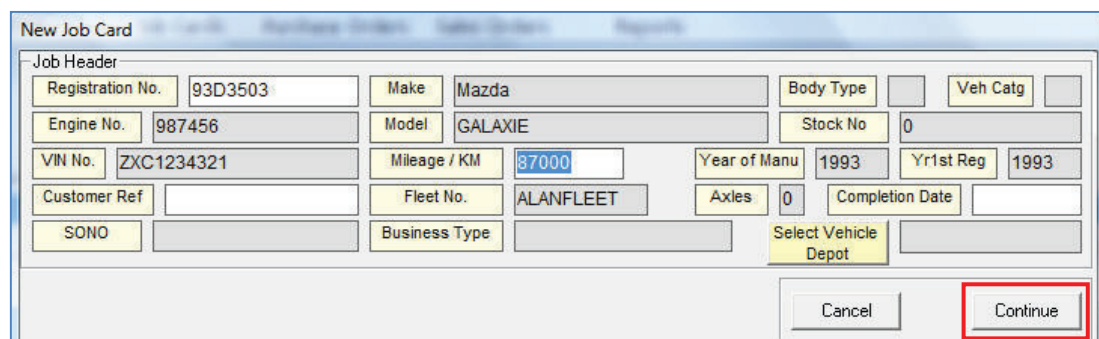


Check Owner and Invoicee

If you are happy with the invoicee details, click **Yes** to confirm it is correct.

If you are not happy with the invoicee details, click **No** and you will be brought to the section where you can alter the invoicee for the job card for this vehicle.

The system will fill in as much of the details at the top of the form as it knows regarding the vehicle.



Known Vehicle

Click **Continue**.

Ensure that the mileage/km is correct as this is relevant for the updating of the Service/ Calibration area which is triggered by distance travelled as well as amount of time that is passed.

This is why the system queries as to whether you have checked the *Mileage Figure* and also whether you actually want to create the job.

If you want to continue, click **Yes**.

If you want to abandon this job card, then click **No**.

FleetMinder

Have you checked the Mileage Figure? Do you wish to Create this Job?

Yes No

Odometer Confirmation

At this stage you may see a warning if the customer has gone over their credit limit in Sage.

FleetMinder

Credit Limit has been reached/exceeded for this Account
 Credit Limit: 2000.00
 On Account: 2399.12
 On WIP: 0.00
 BALANCE: -399.12

OK

Credit Limit Warning

The Credit Limit warning will not prevent you from continuing with the Job Card, it is only present as a warning. Contact your Accounts department to resolve any issues.

You will then be brought to a reduced version of the job card where you can enter the basic information necessary to start the job card.

New Job Card

Job Header

Registration No.	93D3503	Make	Mazda	Body Type		Veh Catg	
Engine No.	987456	Model	GALAXIE	Stock No	0		
VIN No.	ZXC1234321	Mileage / KM	87000	Year of Manu	1993	Yr1st Reg	1993
Customer Ref		Fleet No.	ALANFLEET	Axles	0	Completion Date	
SONO		Business Type		Select Vehicle Depot			

Details for Job Number: 001373374

Instructions | Vehicle Details | Customer | Job Types

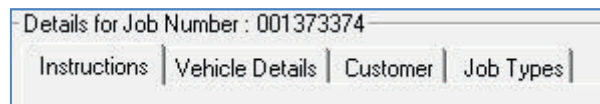
Add

Save Close

Basic Job Card

There are 4 tabs available:

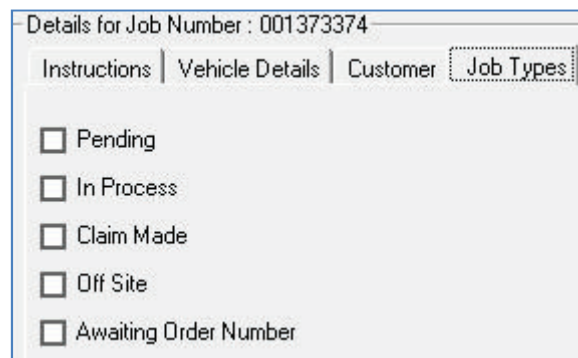
- *Instructions* – see the next section for details
- *Vehicle Details* – a read-only summary of the vehicle details
- *Customer* – details of the customer and invoicee
- *Job Types* – details on the type of work to be carried out.



Tabs

Vehicles Details and *Customer* are read-only so they can only be viewed. Instructions are dealt with in the next section.

The *Job Types* tab contains checkboxes that can be used to bring certain types of job to the attention of the mechanics.



Job Types Tab

Clicking on a checkbox will automatically add an instruction to the Job Card.

At this stage you can click **Save** to save the Job Card, or click **Close** to close the Job Card.

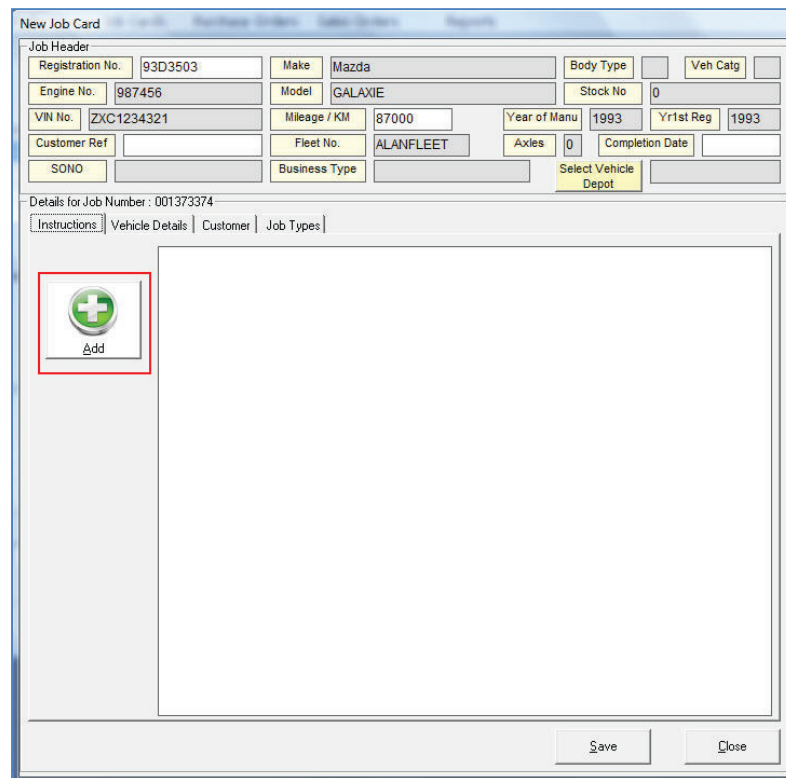
Or, to add instructions to the Job Card, read the next section.

Job Card Instructions

Add an Instruction to a Job Card

Click on the **Instructions** tab.

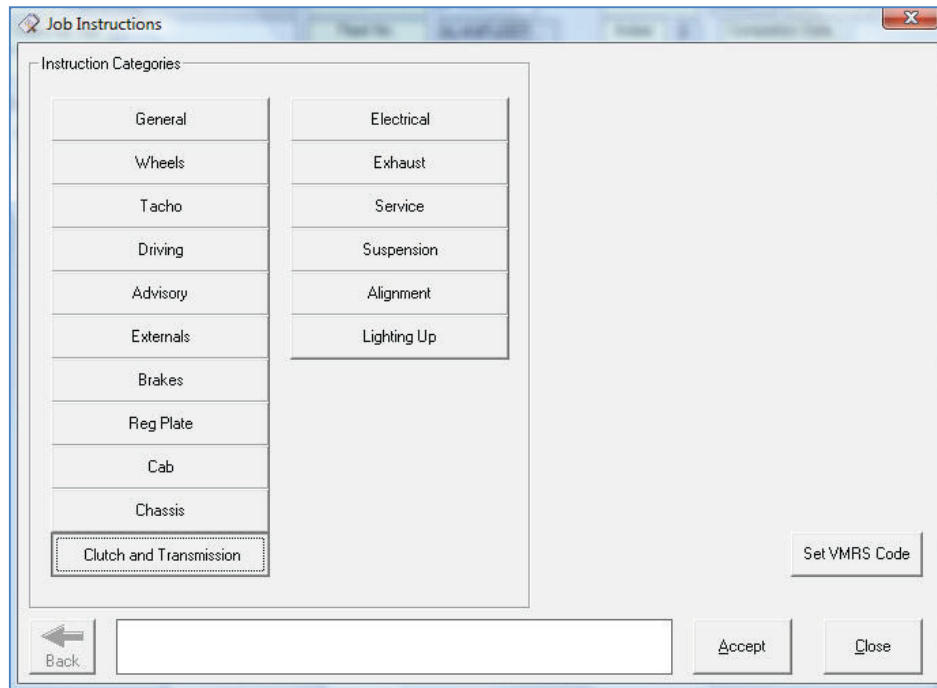
Click on the **Add** button.



Add an Instruction

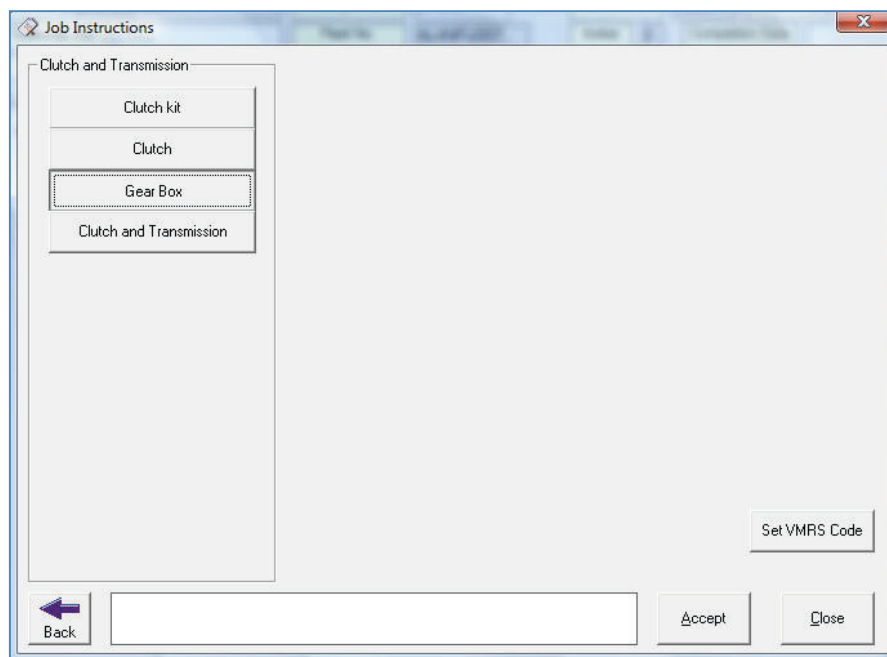
During setup of the system, your administration will have generated a list of instruction categories and sub-details. In the example here, we have used a frequent occurring item, but it may not be in the same location and you must familiarise yourself with your companies selected Instruction Categories and Sub-Details.

Click on the *Instruction Category* that you wish to use. Our example has selected **Clutch and Transmission** button.



Instruction Category

Next, click on the *Sub-Detail*.
In our example, we have selected **Gear Box**.



Sub-detail in the Job Instruction

The next screen prompts us to select an *Item*, in our example, we select **Gear Box Seal**.

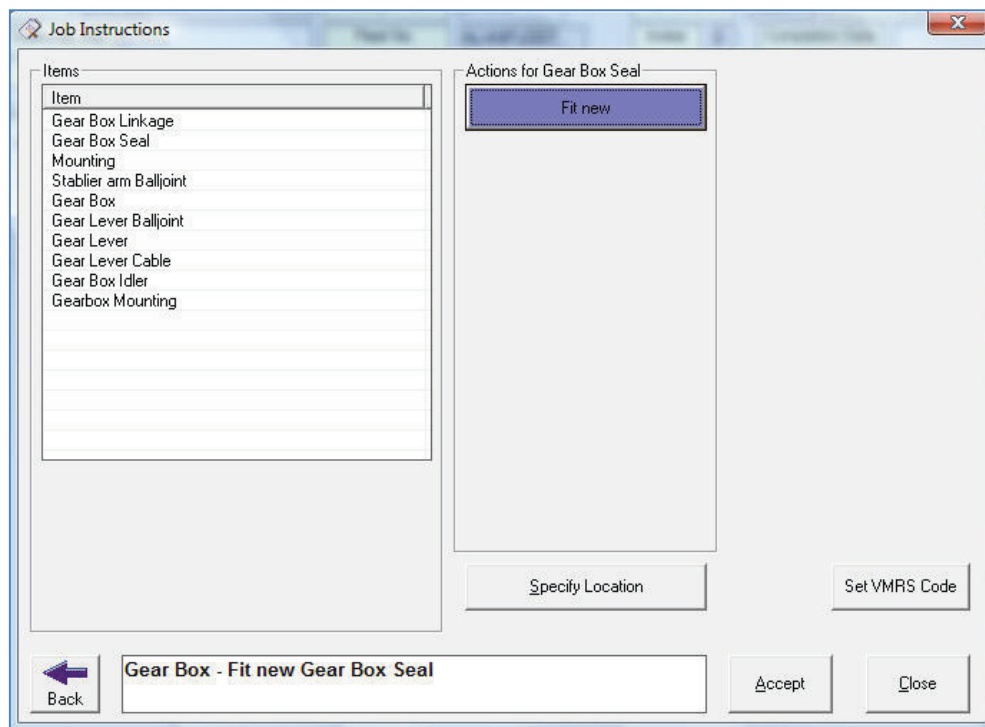
When we click on the item we want to select, a list of *Actions* appears to the right.

Click on the *Action* you wish to instruct to carry out on the Item.

In our example, we have one action button, ***Fit new*** and so we click it.

At the bottom the constructed sentence appears:

“Gear Box – Fit new Gear Box Seal.”

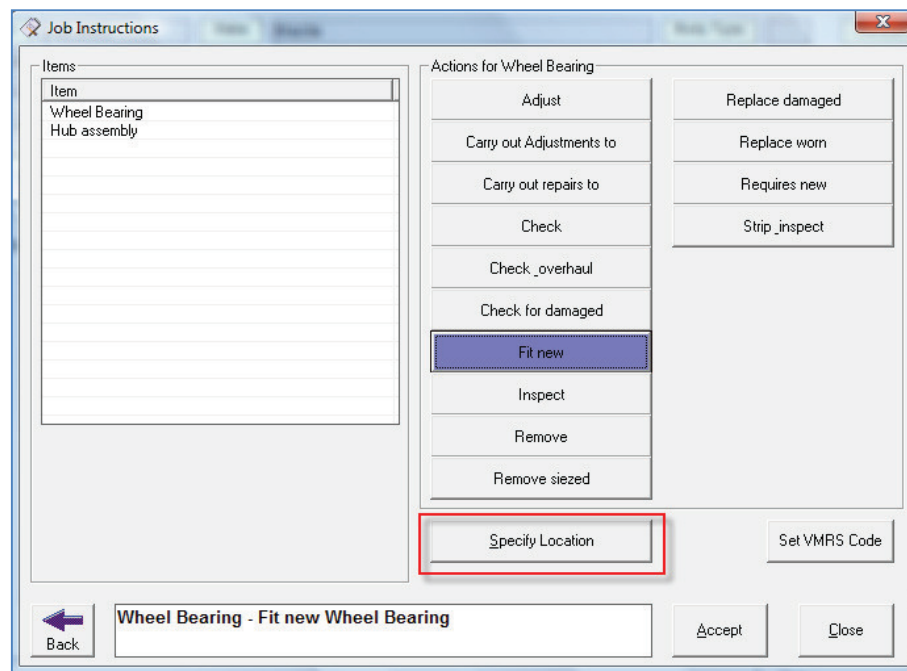


Select the Item and Action

Click ***Accept*** to complete the instruction generation process.

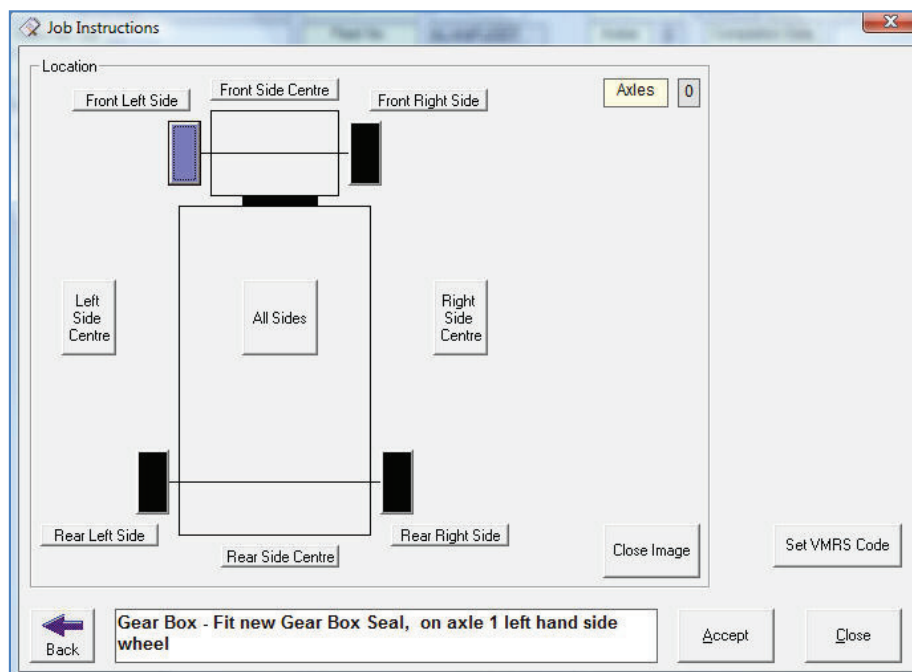
Specify a Location in a Job Instruction

Before you click on **Accept** to save the instruction and close that section, click on the **Specify Location** button.



Specify Location

This will display a basic aerial image of the vehicle.



Location for the Instruction

You can then specify which location the instruction is to be carried out on. In this example it is to replace the damaged tyre on the left at the front (axle 1) of the vehicle.

The locations that are available are:

- *Front Left Side*
- *Front Side Centre*
- *Front Right Side*
- *Right Side Centre*
- *Rear Right Side*
- *Rear Side Centre*
- *Rear Left Side*
- *Left Side Centre*
- *All Sides.*

The button will turn from grey colour to a blue colour to show it is logged. It will also appear in the written instruction in the text box at the bottom of the screen.

You can select more than one location by simply clicking on the required locations.

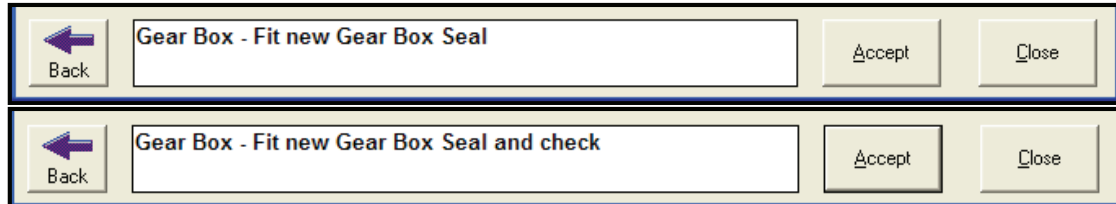
If the vehicle image hasn't enough axles, alter the value in the axle's box in the top right corner.

Click on the tyre image to indicate which tyre needs attention.
The image of the tyre will change colour when it is clicked, going from black colour to a blue colour to show it is logged.

Click **Accept** to store the Instruction created or click on **Close Image** to exit without saving.

Add Your Own Details to the Job Instruction

After you have generated the full instruction, including specifying any location, but before you click **Accept**, click on the white text box where the instruction has been generated and type in any extra text you wish.



The image displays two sequential screenshots of a software interface for editing job instructions. Each screenshot features a horizontal bar with a 'Back' button (indicated by a left-pointing arrow) on the left, a central text input field, and 'Accept' and 'Close' buttons on the right. In the top screenshot, the text field contains the instruction 'Gear Box - Fit new Gear Box Seal'. In the bottom screenshot, the text field contains the modified instruction 'Gear Box - Fit new Gear Box Seal and check', demonstrating the user's addition of extra details.

Add Your Own Details Instruction

In our example: ***Gear Box – Fit new Gear Box Seal*** was generated by the system but then our user clicked the text box, just after the word ***Seal*** and typed in their own extra detail: ***and check***.

Once you are happy with the alteration and wish to save it, click on **Accept**.

NOTE: If you alter the *location* notes or any of the *sub-details*, it will reset the text box with the original system-generated text and your added text will be deleted so ensure that any additional notes are added **AFTER** the generated text has been created.

NOTE: The maximum amount of text that can be entered is 1000 characters.

Edit an Instruction on a Job Card

Open the relevant job card from the list.

Click *Instructions* tab.

Highlight the instruction that you wish to alter by clicking on it once.

Click **Edit**.

Job Card : 001373379

Activity Create Order Workshop Times Parts Report Split Job Card Sign Off Invoice

Registration No. 93D3503 Make Mazda Body Type Vehicle Category
Engine No. 987456 Model GALAXIE Stock No 0
VIN No. ZXC1234321 Mileage / KM 87000 Axles 0 Year of Manu 1993 Year 1st Reg 1993
Setup Date 17/07/2009 Completion Date Fleet No. ALANFLEET Vehicle Depot
Starting Order No. Closing Order No. n/a Dealer Warr Claim No
SONO Business Type

Labour / Parts Instructions Vehicle Details Customer Reports Notes Orders Scan Docs Job Type Faults Job Audit

Rear Brakes - replace **worn** rear break pads

Add Edit Remove

Rear Brakes - replace **all** rear break pads

Status: Open Change Save Close

Edit an Instruction

This will bring up a text box, with the instruction filled in it.

Edit the text as appropriate – in our example, 'Replace **worn** rear brake...' is replaced with 'Replace **ALL** rear brake...'

Once you are happy with the alteration, press **Enter**.

This will change the instruction that is displayed.

Delete an Instruction from a Job Card

After opening the job card you wish to edit from the **Job Cards** section, click on the *Instructions* tab.

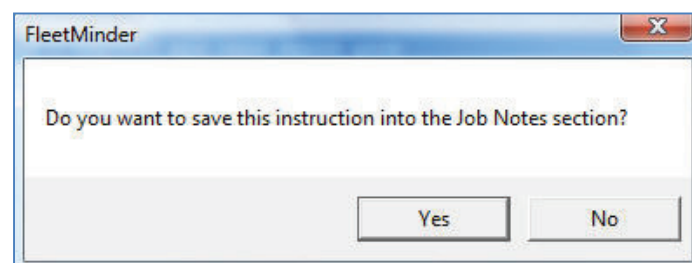
Highlight the instruction that you wish to delete.

Click **Remove**.

The screenshot shows the FleetMinder Job Card interface for Job Card 001373379. The top navigation bar includes icons for Activity, Create Order, Workshop Times, Parts, Report, Spilt Job Card, and Sign Off Invoice. Below this is a form with various fields: Registration No. (93D3503), Make (Mazda), Body Type, Vehicle Category, Engine No. (987456), Model (GALAXIE), Stock No. (0), VIN No. (ZXC1234321), Mileage / KM (87000), Axles (0), Year of Manu (1993), Year 1st Reg (1993), Setup Date (17/07/2009), Completion Date, Fleet No. (ALANFLEET), Vehicle Depot, Starting Order No., Closing Order No. (n/a), Dealer Warr Claim No., SONO, and Business Type. The main section has tabs for Labour / Parts, Instructions, Vehicle Details, Customer, Reports, Notes, Orders, Scan Docs, Job Type, Faults, and Job Audit. The Instructions tab is active, showing a list of instructions. The first instruction is "Rear Brakes - replace all rear break pads". To the left of the list are three buttons: Add (green plus), Edit (green circular arrow), and Remove (red X). The Remove button is highlighted with a red rectangular box. At the bottom right, there are buttons for Status (Open, Change), Save, and Close.

Delete an Instruction

A message box will then appear asking if you want to save the deleted instruction in the notes section of the Job Card.

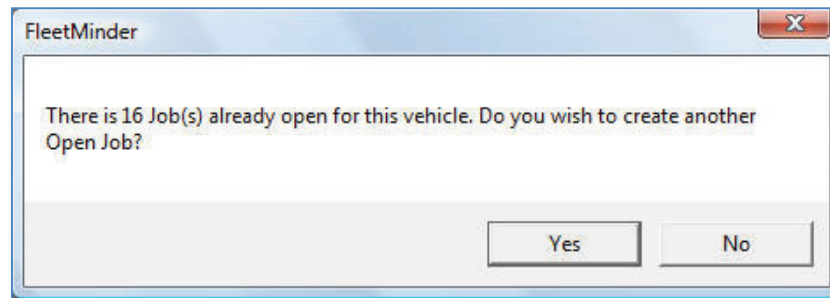


Save Deleted Instruction

Click **Yes** to save the deleted instruction in the Notes section of the Job Card, click **No** to discard the deleted instruction.

Create a New Job Card if There is Already One Open for a Vehicle

If there are any job cards already open for a vehicle a message will appear on the screen querying if you want to create another job card.



Other Open Jobs

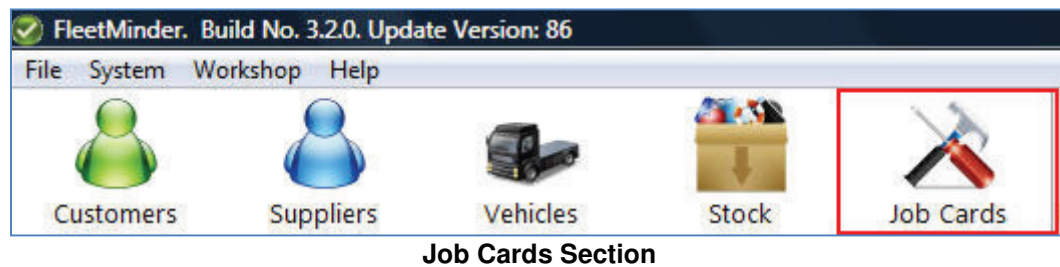
There is no limit on the number of job cards that can be created at the one time against one vehicle.

If you do not want to create a new job card, click **No**.

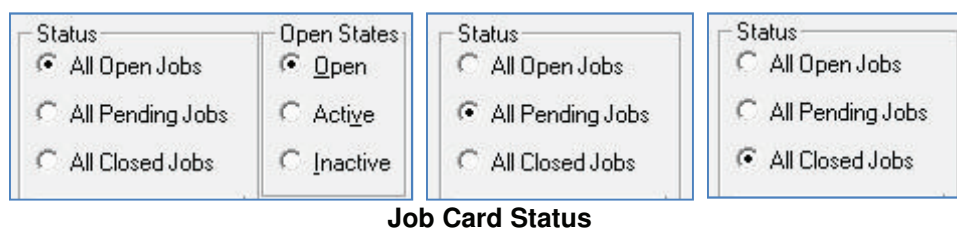
If you want to create another job card, click **Yes**.

View Jobs with Alternative Status

Enter the Job Cards section from the main menu.



You will have a display of all open job cards with a status of Open.



Status

- Open – Job Cards that are created and available to be worked on.
- Pending – Job Cards that are finished but haven't been signed off.
- Closed – Job Cards that are signed off and the invoice released.

The Open status can be further sub-divided into 3 states.

- Open – Default state when a Job Card is created.
- Active – Jobs that are currently “clocked in” in the workshop.
- Inactive – Jobs that have been worked on in the workshop.

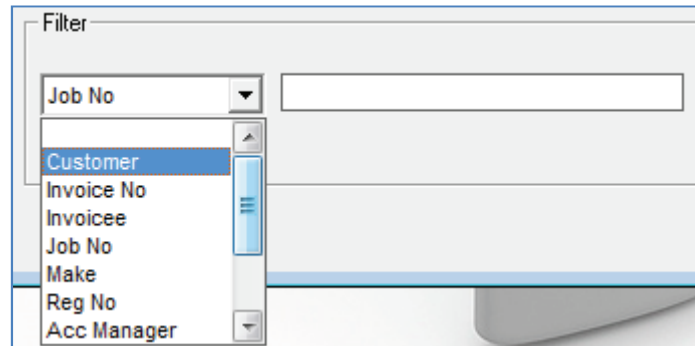
Note – the Active and Inactive states are only used in sites that use the Workshop Module.

All Pending Jobs and *All Closed Jobs* do not have any sub-states.

Click each radio-button as appropriate for the search you wish to carry out and then the list of Job Cards will automatically refreshed with the appropriate selection.

Search for a Specific Job Card

In the Job Card section there is a facility for filtering the job cards.



Filter/Search Job Card

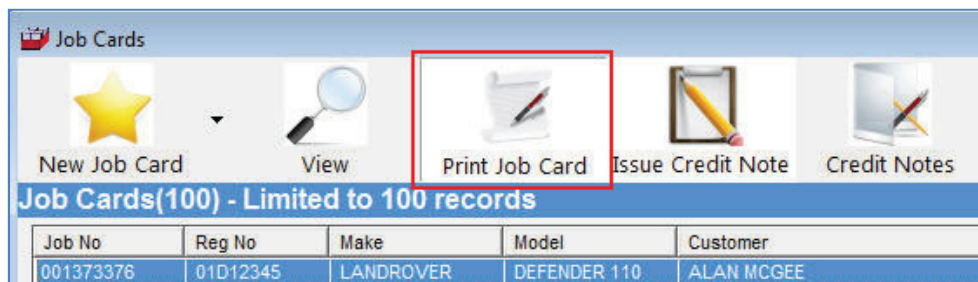
You have the selection of picking from:

- **Customer**
- **Invoice No**
- **Invoicee**
- **Job No**
- **Make**
- **Reg. No**
- **Acc Manager**

You can select any of these fields. For *Customer*, *Invoicee*, *Make* and *Account Manager* you can start to type in the name and then make your selection from the drop-down menu.

However, with *Invoice No.*, *Job No.* and *Reg. No.* you must put in the full number and click on **Go** to retrieve the required information.

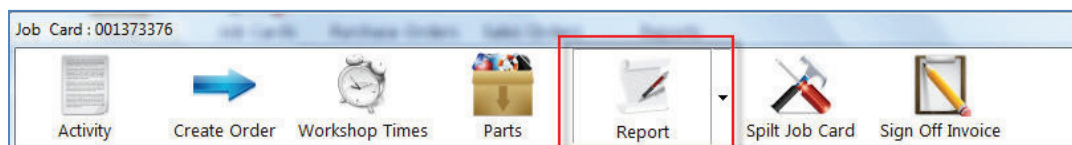
Re-Print a Job Card



Print Job Card

Select the job card that you wish to print and then click on **Print Job Card**.

Alternatively, you can enter the Job Card by double-clicking on it and then choose **Report** from the Job Card menu.



Job Card Report

A report preview is displayed on the screen for that job card.

The screenshot shows a report preview titled 'Job Card Instructions' in a box at the top center. The date and time '17/07/2009 14:55' are displayed in the top right corner. The report contains the following information:

ALAN MCGEE
Ardee Business Park

Ardee
C.o Louth

Invoicee : ALAN MCGEE
Customer No : ALA08035
Reviewed By : Alan McGee

Job No : 1373376
Creation Date : 14/07/2009
Creation Time : 15:14:25

Reg. Number : 01D12345
Chassis No : CHASS


Made : LANDROVER
Model : DEFENDER 110
Radio No : Key Code : Engine No : Mileage : 0 Fleet No : 0

Parts List

PartNo	Description	Qty	Serial No	Location	Depot
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Job Card

To print it, click on **Print**, select the printer (it will automatically pick the default printer from your PC unless you pick otherwise) and then click **Print**.

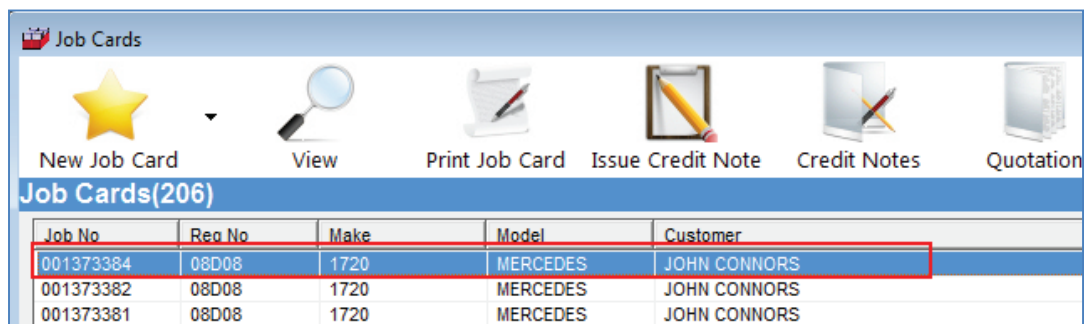
The job card will be printed and you can then close the screen by clicking the  in the top right corner.

Delete a Job Card

NOTE – this facility is only available if enabled in System Parameters.

A Job Card can only be deleted if there are no parts or labour assigned to the Job Card.

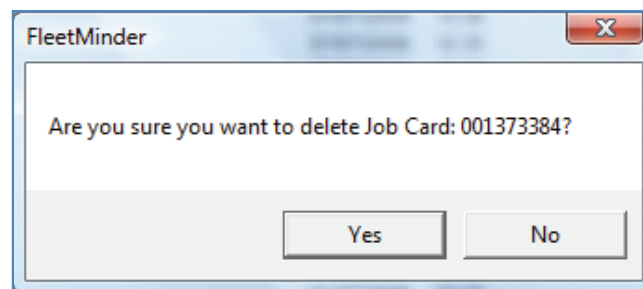
Select the Job Card that you would like to delete by left-clicking on it once.



Select Job Card for Deletion

To delete the Job Card, right-click on it.

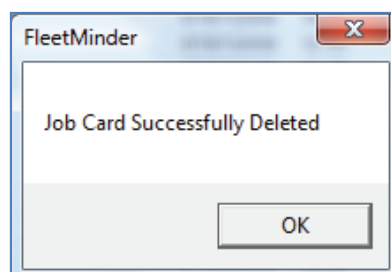
A message box will appear asking you to confirm the deletion.



Confirm Deletion

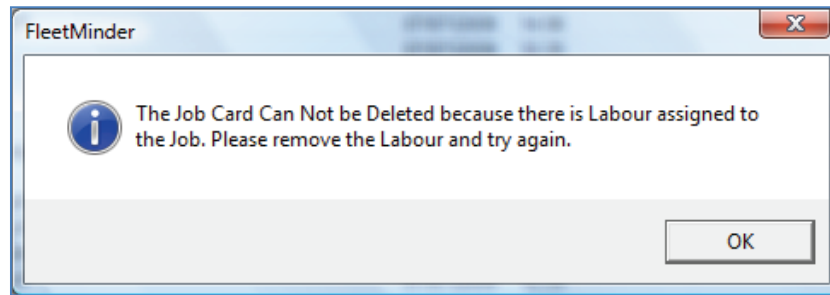
Click **Yes** to confirm the deletion or click **No** to cancel.

A message box will appear confirming the Job Card has been deleted.



Job Card Deleted

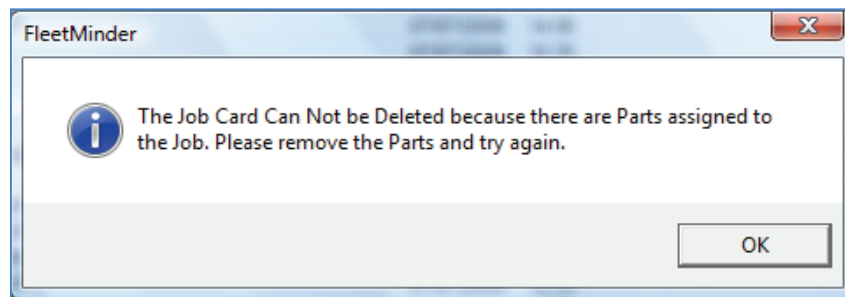
If there is labour assigned to the Job Card then an error message will appear to notify you.



Labour Error

The labour must be manually removed from the Job Card before it can be deleted.

If there are parts assigned to the Job Card then an error message will appear to notify you.

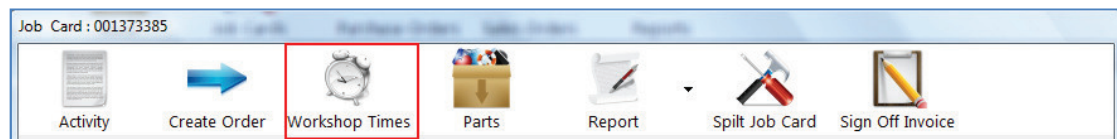


Parts Error

The parts must be manually removed from the Job Card before it can be deleted.

Add Labour to a Job Card

To add labour to a Job Card click on **Workshop Times**.



Add Labour

- First select the *Engineer* from the dropdown menu.
- Then choose the *Labour Rate* from the dropdown menu.
- Finally, enter the *Worked Time* and *Charged Time*.

A screenshot of a 'Workshop Times' form. The title is 'Workshop Times for Job : 001373379'. The form contains several input fields and buttons. The 'Engineer' dropdown menu is set to 'Alan McGee' and is highlighted with a red box. The 'Labour Rate' dropdown menu is set to 'Std Labour' and is also highlighted with a red box. The 'Charged Time' field is set to '2.00' and is highlighted with a red box. Other fields include 'Job Number' (001373379), 'Stock Supply Depot' (ASC Software (Ardee)), 'VMRS Code', 'Add Instruction' button, 'Code' (1101), 'Rate P/h' (60.00), 'Standard Time' (1.00), 'Default' (60.00), 'Date' (17/07/2009), 'VAT Code' (T1), 'Start Time' (00:00), 'End Time' (00:00), 'Worked Time' (00.00), and 'Charge Value' (120.00). At the bottom right are 'Save' and 'Close' buttons.

Add Labour

Optionally, if more detail is required then you can add:

- VMRS Code – by clicking on *VMRS Code*
- Instructions – by clicking on *Add Instruction*
- Date – by clicking on the *Date* dropdown menu
- Times – by entering the *Start Time* and *End Time*

Click on **Save** to save the changes or click on **Close** to exit without saving the changes.

The labour will then be added to the Job Card. Additional labour can also be added by repeating this process.

Edit Labour on a Job Card

Open the Job Card on which you would like to edit the Labour:

Job Card : 001373379

Activity Create Order Workshop Times Parts Report Split Job Card Sign Off Invoice

Registration No. 93D3503 Make Mazda Body Type Vehicle Category
Engine No. 987456 Model GALAXIE Stock No 0
VIN No. ZXC1234321 Mileage / KM 87000 Axles 0 Year of Manu 1993 Year 1st Reg 1993
Setup Date 17/07/2009 Completion Date Fleet No. ALANFLEET Vehicle Depot
Starting Order No. Closing Order No. n/a Dealer Warr Claim No
SONO Business Type

Labour / Parts Instructions Vehicle Details Customer Reports Notes Orders Scan Docs Job Type Faults Job Audit

Labour Code	Description	Rate	Hours	Total	VAT Code
1101	Std Labour	60.00	2.00	120.00	T1

Part No	Description	Val Price	Qty	Total Cost	Total Sale	VAT Code
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Status: Open Change
Save Close

Job Card

In the *Labour/Parts* tab, double-click on the Labour that you would like to edit.

A window will appear with the details of the labour:

Job Labour : 001373379

Labour Code : 1101

Employee	Date	Start	End	Worked	Charged	Inv To	VAT	VMRS
Alan McGee	17/07/2009	00:00	00:00	0.00	2.00	ALAN MCGEE	T1	

Global VAT Code Adjustment Close

Labour Details

On this screen you can edit the VAT on the labour by clicking on **Global VAT Code Adjustment**.

Job Labour : 001373379

Labour Code : 1101

Employee	Date	Start	End	Worked	Charged	Inv To	VAT	VMRS
Alan McGee	17/07/2009	00:00	00:00	0.00	2.00	ALAN MCGEE	T1	

T0 - VAT @ 0%
 T1 - VAT @ 15%
 T17 - ZERO EU PURCHASES
 T2 - VAT @ Upper Rate
 T21 - Temp VAT @ 15%
 T4 - EU SALES
 T8 - EU PURCHASES
 T9 - NON VATABLE PRODU

Set Now Close

Adjust VAT Code

A dropdown menu will appear allowing you to choose a different VAT code. When you have selected the VAT code click on **Set Now**.

Note – this will change the VAT for all the labour visible on the screen (if there is more than one line).

To edit further details of the labour, double click on the labour line.

The following window will appear:

Edit Job Labour

Labour Code : 1101

Name	Alan McGee		Rate Per Hour
Date	17/07/2009	Add Instruction	60

Start Time	End Time	Worked Time	Charged Time	Charge Value
00:00	00:00	0.00	2.00	120.00

Invoice To

Set to Same as Vehicle Owner

ALAN MCGEE

Ardee Business Park

Ardee

C.o Louth

ALA08035

Save Close

Edit Labour Details

On this screen you can edit the instructions by clicking on **Add Instruction**. This will bring you to the Instructions menu.

You can manually edit the:

- Start Time
- End Time
- Worked Time
- Charged Time

To do this simply enter a new value.

To change the invoicee for this labour, enter part or all of the name into the *Invoice To* section and click on **Enter**.

The labour rate and Engineer cannot be edited. If they must be edited then the labour must be deleted and re-entered.

To save your changes click on **Save** or to exit without saving click on **Close**.

Delete Labour on a Job Card

Open the Job Card on which you would like to edit the Labour:

Labour Code	Description	Rate	Hours	Total	VAT Code
1101	Std Labour	60.00	2.00	120.00	T1

Part No	Description	Val Price	Qty	Total Cost	Total Sale	VAT Code
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Job Card

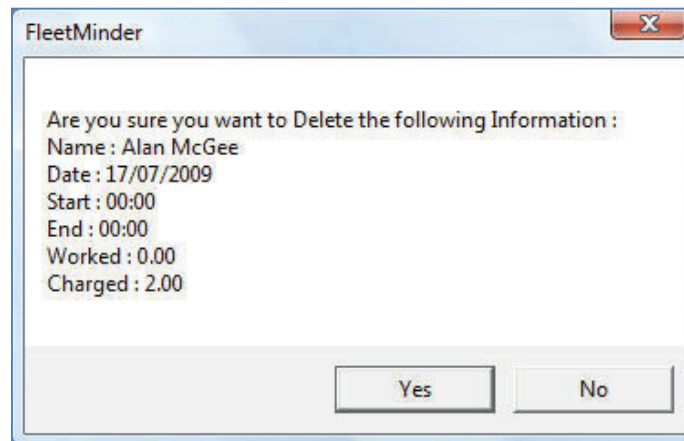
To delete labour on this Job Card double-click on the labour line.

A window will appear with the details of the labour:

Employee	Date	Start	End	Worked	Charged	Inv To	VAT	VMRS
Alan McGee	17/07/2009	00:00	00:00	0.00	2.00	ALAN MCGEE	T1	

Labour Details

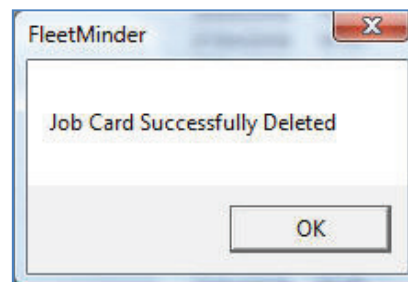
Right-click on the labour line that you would like to delete.
A window will appear asking you to confirm the deletion:



Delete Labour

Click on **Yes** to delete the labour or **No** to cancel the change.

A message box will then appear confirming that the labour has been deleted.



Labour Deleted

Move All Labour to a New Invoicee

Open the Job Card on which you would like to move the Labour to a new invoicee:

Job Card : 001373379

Activity Create Order Workshop Times Parts Report Split Job Card Sign Off Invoice

Registration No.	93D3503	Make	Mazda	Body Type		Vehicle Category	
Engine No.	987456	Model	GALAXIE	Stock No	0		
VIN No.	ZXC1234321	Mileage / KM	87000	Axles	0	Year of Manu	1993
Setup Date	17/07/2009	Completion Date		Fleet No.	ALANFLEET	Year 1st Reg	1993
Starting Order No.		Closing Order No.	n/a	Vehicle Depot			
SONO		Business Type		Dealer Warr Claim No			

Labour / Parts	Instructions	Vehicle Details	Customer	Reports	Notes	Orders	Scan Docs	Job Type	Faults	Job Audit
Labour Code	Description	Rate	Hours	Total	VAT Code					
1101	Std Labour	60.00	2.00	120.00	T1					

FleetMinder

Are you sure you want to move ALL LABOUR to a new Invoice

Yes No

Part No	Description	Status
		Open Change
		Save Close

Job Card

To move Labour to a new invoicee, right-click on a Labour line.

Click **Yes** to move the labour or click **No** to cancel.

The Invoicee window will then appear.

Select Invoicee for this Job Card

Reg No.: 93D3503

Vehicle Owner ☐ Same as Owner

ALAN MCGEE

Ardee Business Park

Ardee

C.o Louth

ALA08035

Invoice To ☐ Same as Owner

ALAN MCGEE

Ardee Business Park

Ardee

C.o Louth

ALA08035

Change Invoicee

Save

Select Invoicee

Click on **Change Invoicee**.

A text box will open up underneath, type in all or part of the name of the new invoicee and press **Enter**.

Select Invoicee for this Job Card

Reg No.: 93D3503

Vehicle Owner ☐ Same as Owner

ALAN MCGEE

Ardee Business Park

Ardee

C.o Louth

ALA08035

Invoice To ☐ Same as Owner

ALAN MCGEE

Ardee Business Park

Ardee

C.o Louth

ALA08035

Change Invoicee

Enter Search Details

ASC Softwa

Save

Search for Invoicee

Fleetminder will display a list of customers that match your search query.

Ref	Name	Address
ASC07203	ASC Software -- AHS Installations	11/12 Westlink Ind. Est.
002371	ASC SOFTWARE LTD	12 WESTLINK IND EST.

Customer Results

Select the customer you would like to use and click on **Use**.

FleetMinder will then update the invoicee details with the new invoicee.

Reg No.: 93D3503

Vehicle Owner	Invoice To Same as Owner
ALAN MCGEE	ASC Software -- AHS Installations
Ardee Business Park	11/12 Westlink Ind. Est.,
	Kylemore Road,
Ardee	Dublin 10
C.o Louth	
ALA08035	ASC07203 Change Invoicee

Save

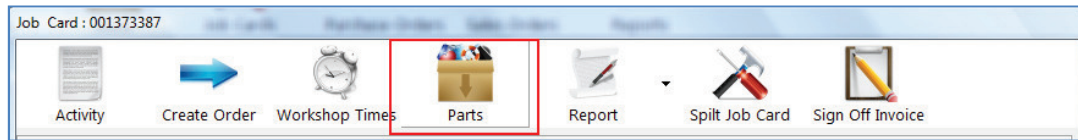
Updated Invoicee

Click on **Save** to save the changes.

Once the Job Card has been signed off, FleetMinder will automatically create a new Job Card with the labour on it invoiced to the new customer.

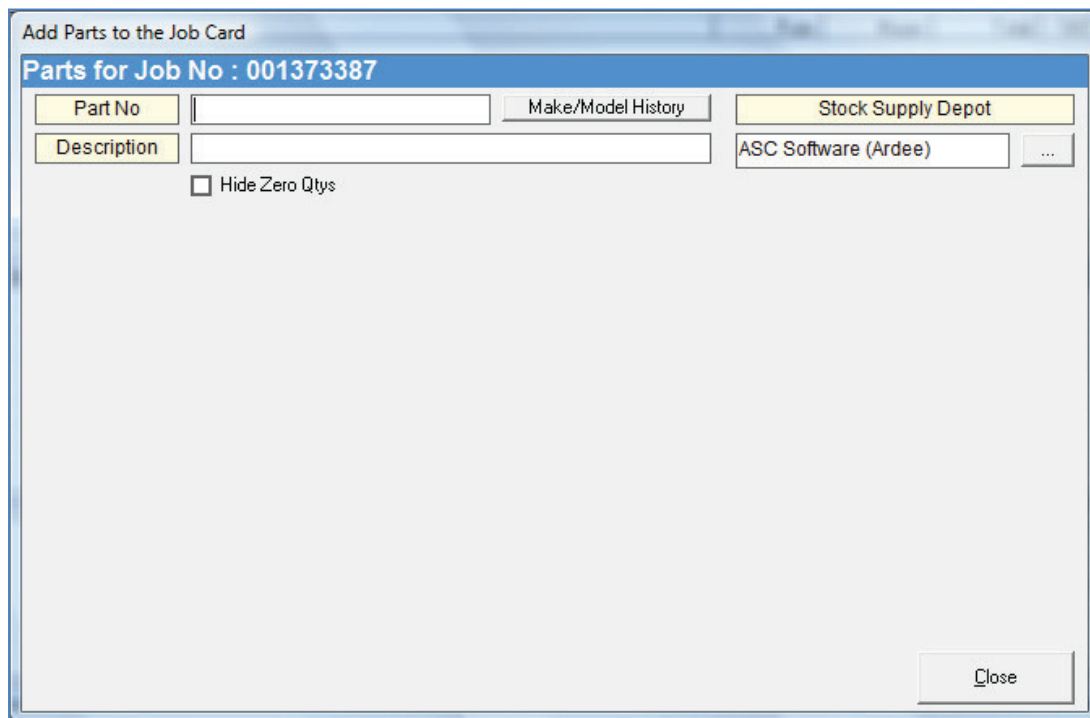
Add Parts to a Job Card

To add parts to a Job Card click on **Parts**.



Add Parts

The following window will appear:

A screenshot of a dialog box titled 'Add Parts to the Job Card'. The subtitle is 'Parts for Job No : 001373387'. The dialog contains two input fields: 'Part No' and 'Description'. To the right of the 'Part No' field is a button labeled 'Make/Model History'. To the right of the 'Description' field is a button labeled 'Stock Supply Depot'. Below the 'Description' field is a checkbox labeled 'Hide Zero Qtys'. At the bottom right of the dialog is a 'Close' button.

Enter Part Number

Enter in part or all of the *Part Number*, or enter in part or all of the *Description* and click on **Enter**.

A grid will appear with all the entries that match your search query.

Add Parts to the Job Card

Parts for Job No : 001373387

Part No: giz Make/Model History Stock Supply Depot

Description: ASC Software (Ardee) ...

☐ Hide Zero Qtys

Parts List

Part No	Description	Location	Min	Free
GIZ001	Gizmo	4505	10	0
GIZM01	New Gizmo	4505	1	0
GIZM02	Another Gizmo	4505	1	0
GIZM099	GIZM099	4310	0	0
GI	GI	4307	0	0
NEWGIZMO	Gizmo01	A.01	1	88

Use Cancel

Close

Select Part

Highlight the line with the part that you wish to add and click on **Use**.

Note – the part must be in stock i.e. the figure in the *Free* column must be greater than 0.

On the next screen, enter the quantity of the part that you would like to add to the Job Card:

Add Parts to the Job Card

Parts for Job No : 001373387

Part No: NEWGIZMO Make/Model History Stock Supply Depot

Description: Gizmo01 ASC Software (Ardee)

☐ Hide Zero Qtys

Bin Stock: 88 Valuation Price: 10.00

Location: A.01 % Margin: 23.0769 % % Discount: 0.00 %

Qty Required: 1 Selling Price: 13.00 Total Sale: 13.0000

Serial Number Required ☐ ☒ Selling Price Is Preset

Select Fault: 00 - No Fault Selected

Save Close

Close

Enter Quantity

Click on **Save** and the part will be added to the Job Card.

To add another part to the Job Card, repeat the process by entering another part number. When all the parts have been added, click on **Close**.

Job Card : 001373387

Activity Create Order Workshop Times Parts Report Spilt Job Card Sign Off Invoice

Registration No. 93D3503 Make Mazda Body Type Vehicle Category
 Engine No. 987456 Model GALAXIE Stock No 0
 VIN No. ZXC1234321 Mileage / KM 87000 Axles 0 Year of Manu 1993 Year 1st Reg 1993
 Setup Date 11/08/2009 Completion Date Fleet No. ALANFLEET Vehicle Depot
 Starting Order No. Closing Order No. n/a Dealer Warr Claim No
 SONO Business Type

Labour / Parts Instructions Vehicle Details Customer Reports Notes/SMS Orders Scan Docs Job Type Faults Job Audit

Labour Code	Description	Rate	Hours	Total	VAT Code

Part No	Description	Val Price	Qty	Total Cost	Total Sale	VAT Code
NEWGIZMO	Gizmo01	10.00	1	10.00	13.00	T9

Status
 Open Change
 Save Close

Part Added to Job Card

Edit Parts on a Job Card

Open the Job Card on which you would like to edit the part.

Job Card : 001373387

Activity Create Order Workshop Times Parts Report Spilt Job Card Sign Off Invoice

Registration No.	93D3503	Make	Mazda	Body Type		Vehicle Category	
Engine No.	987456	Model	GALAXIE	Stock No	0		
VIN No.	ZXC1234321	Mileage / KM	87000	Axles	0	Year of Manu	1993
Setup Date	11/08/2009	Completion Date		Fleet No.	ALANFLEET	Year 1st Reg	1993
Starting Order No.		Closing Order No.	n/a	Vehicle Depot		Dealer Warr Claim No	
SONO		Business Type					

Labour / Parts Instructions Vehicle Details Customer Reports Notes/SMS Orders Scan Docs Job Type Faults Job Audit

Labour Code	Description	Rate	Hours	Total	VAT Code

Part No	Description	Val Price	Qty	Total Cost	Total Sale	VAT Code
NEWGIZMO	Gizmo01	10.00	1	10.00	13.00	T9

Status
Open Change
Save Close

Part on a Job Card

Double-click on the part you want to edit.

The Job Parts Edit screen will appear.

Job Parts Edit : 001373387

Part No : NEWGIZMO - (1)

Transactions IN

Date	Serial No	Qty	Val Price	% Mrgn	Sale Price	Inv To	VAT	Fault Id	Stock Depot
11/08/2009		1.00	10.00	23.08	13.00	ASC Software -- AHS Installations	T9	0	ASC Software (Ardee)

Transactions OUT

Date	Serial No

Global Margin Adjustment Assign VMRS Code Global Delete
Global Discount Adjustment Global Invoice Change
Global VAT Code Adjustment
Close

Edit Part

On this screen the following options are available:

- Global Markup Adjustment
- Global Discount Adjustment
- Global VAT Code Adjustment
- Assign VMRS Code
- Global Invoicee Change
- Global Delete

To change any of these values simply click on the button and enter your new value.

Note – any changes you make will be made to all parts that are shown on this screen.

Click **Close** to finish.

Delete Parts on a Job Card

Open the Job Card on which you would like to delete the part.

Job Card : 001373387

Activity

Create Order

Workshop Times

Parts

Report

Spilt Job Card

Sign Off Invoice

Registration No.

93D3503

Make

Mazda

Body Type

Vehicle Category

Engine No.

987456

Model

GALAXIE

Stock No

0

VIN No.

ZXC1234321

Mileage / KM

87000

Axles

0

Year of Manu

1993

Year 1st Reg

1993

Setup Date

11/08/2009

Completion Date

Fleet No.

ALANFLEET

Vehicle Depot

Starting Order No.

Closing Order No.

n/a

Dealer Warr Claim No

SONO

Business Type

Labour / Parts

Instructions

Vehicle Details

Customer

Reports

Notes/SMS

Orders

Scan Docs

Job Type

Faults

Job Audit

Labour Code	Description	Rate	Hours	Total	VAT Code

Part No	Description	Val Price	Qty	Total Cost	Total Sale	VAT Code
NEWGIZMO	Gizmo01	10.00	1	10.00	13.00	T9

Status

Open

Change

Save

Close

Part on a Job Card

Double-click on the part you want to delete.

The Job Parts Edit screen will appear.

Job Parts Edit : 001373387

Part No : NEWGIZMO - (1)

Transactions IN

Date	Serial No	Qty	Val Price	% Mrgn	Sale Price	Inv To	VAT	Fault Id	Stock Depot
11/08/2009		1.00	10.00	23.08	13.00	ASC Software -- AHS Installations	T9	0	ASC Software (Ardee)

Transactions OUT

Date	Serial No

Global Margin Adjustment

Global Discount Adjustment

Global VAT Code Adjustment

Assign VMRS Code

Global Invoicee Change

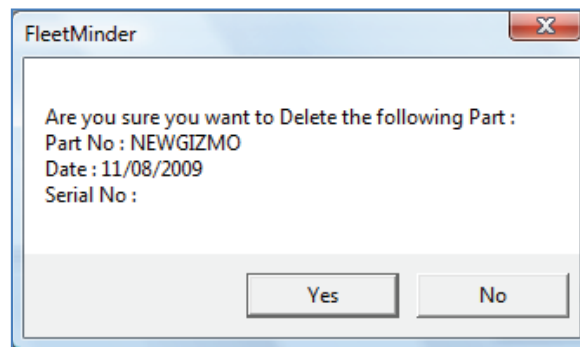
Global Delete

Close

Delete Part

To delete a part right-click on the line that contains the part.

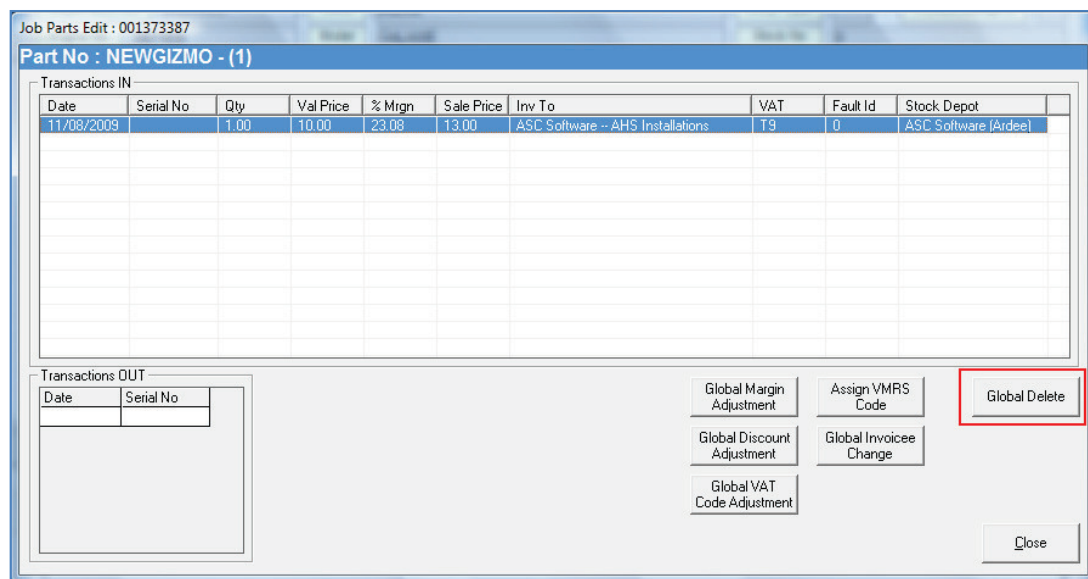
A message box will appear asking you to confirm the deletion.



Confirm Deletion

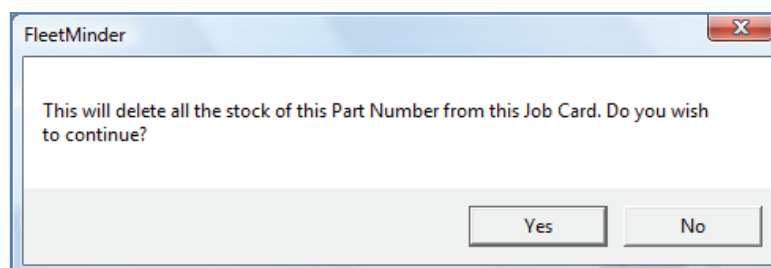
Click **Yes** to delete the part or click **No** to cancel.

If you want to delete all the parts on a Job Card click on the **Global Delete** button.



Global Delete

A message box will appear asking you to confirm the global deletion.



Confirm Global Delete

Click **Yes** to delete the parts or click **No** to cancel.

Move All Parts to a New Invoicee

Open the Job Card on which you would like to move the Labour to a new invoicee:

Job Card : 001373387

Activity
Create Order
Workshop Times
Parts
Report
Spilt Job Card
Sign Off Invoice

Registration No.	93D3503	Make	Mazda	Body Type		Vehicle Category	
Engine No.	987456	Model	GALAXIE	Stock No	0		
VIN No.	ZXC1234321	Mileage / KM	87000	Axles	0	Year of Manu	1993
Setup Date	11/08/2009	Completion Date		Fleet No.	ALANFLEET	Vehicle Depot	
Starting Order No.		Closing Order No.	n/a	Dealer Warr Claim No			
SONO		Business Type					

Labour / Parts
Instructions
Vehicle Details
Customer
Reports
Notes/SMS
Orders
Scan Docs
Job Type
Faults
Job Audit

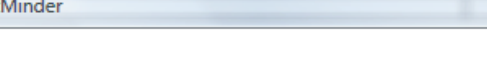
Labour Code	Description	Rate	Hours	Total	VAT Code

Part No	Description	Val Price	Qty	Total Cost	Total Sale	VAT Code
NEWGIZMO	Gizmo01	10.00	1	10.00	13.00	T9

Status

Part on a Job Card

To move parts to a new invoicee, right-click on a part line.



FleetMinder

Are you sure you want to move ALL PARTS to a new Invoice?

Yes No

Confirm Parts Move

Click **Yes** to move the parts or click **No** to cancel.

The Invoicee window will then appear.

Select Invoicee for this Job Card

Reg No.: 93D3503

Vehicle Owner	Invoice To	Same as Owner
ALAN MCGEE	ALAN MCGEE	
Ardee Business Park	Ardee Business Park	
Ardee	Ardee	
C.o Louth	C.o Louth	
ALA08035	ALA08035	Change Invoicee

Save

Click on **Change Invoicee**. A text box will open up underneath, type in all or part of the name of the new invoicee and press **Enter**.

Select Invoice for this Job Card

Reg No.: 93D3503

Vehicle Owner	Invoice To
ALAN MCGEE	ALAN MCGEE
Ardee Business Park	Ardee Business Park
Ardee	Ardee
C.o Louth	C.o Louth
ALA08035	ALA08035

Save

Change Invoicee

Enter Search Details

ASC Softwa

Fleetminder will display a list of customers that match your search query.

[illegible]

Select the customer you would like to use and click on **Use**.

FleetMinder will then update the invoicee details with the new invoicee.

Select Invoicee for this Job Card

Reg No.: 93D3503

Vehicle Owner	Invoice To
ALAN MCGEE	ASC Software -- AHS Installations
Ardee Business Park	11/12 Westlink Ind. Est.,
	Kylemore Road,
Ardee	Dublin 10
C.o Louth	
ALA08035	ASC07203
	Change Invoicee

Save

Updated Invoicee

Click on **Save** to save the changes.

Once the Job Card has been signed off, FleetMinder will automatically create a new Job Card with the parts on it invoiced to the new customer.

Create a Purchase Order Within a Job Card

If a part is not in stock you can create a Purchase Order from within the Job Card to order a part in solely for that job.

The Purchase Order is created using the same process as a standard Purchase Order, the difference is that when the part is received it is added to the Job Card, not added to stock.

To create the Purchase Order, open the Job Card and click on **Create Order**.

Job Card : 001373387

Activity **Create Order** Workshop Times Parts Report Spilt Job Card Sign Off Invoice

Registration No. 93D3503 Make Mazda Body Type Vehicle Category
Engine No. 987456 Model GALAXIE Stock No 0
VIN No. ZXC1234321 Mileage / KM 87000 Axles 0 Year of Manu 1993 Year 1st Reg 1993
Setup Date 11/08/2009 Completion Date Fleet No. ALANFLEET Vehicle Depot
Starting Order No. Closing Order No. n/a Dealer Warr Claim No
SONO Business Type

Labour / Parts Instructions Vehicle Details Customer Reports Notes/SMS Orders Scan Docs Job Type Faults Job Audit

Create Order

The standard Purchase Order screen is displayed.

Type in all or part of the Suppliers name in the text box mark *A/C No* and press **Enter**.

New Purchase Order

Details | Order Details |

AC No. asc software Cust ref
Date 11/08/2009 Order No 106291
Purchase Discount Type
Stock Depot ASC Software (Ardee) ...

Part No	Qty	Price	Vat Code	Net	VAT	Gross

Add Product

Total Grand Total

Save ☐ Auto Receive Parts Close

Enter Customer

A list of suppliers matching the search query will be displayed.

[illegible]

Select Supplier

Select the supplier that you want to use and click on **Use**.


To add a part to the purchase order click on **Add Product**.

New Purchase Order

Details | Order Details

AC No.	ASCISOFTW	Cust ref		ASC Software Ltd 58 Le Broquay Avenue Parkwest Industrial Park Dublin 12
Date	11/08/2009	Order No	106291	
Purchase Discount Type	0000 : n/a			
Stock Depot	ASC Software (Ardee)			

Part No	Qty	Price	Vat Code	Net	VAT	Gross

 Add Product


Total

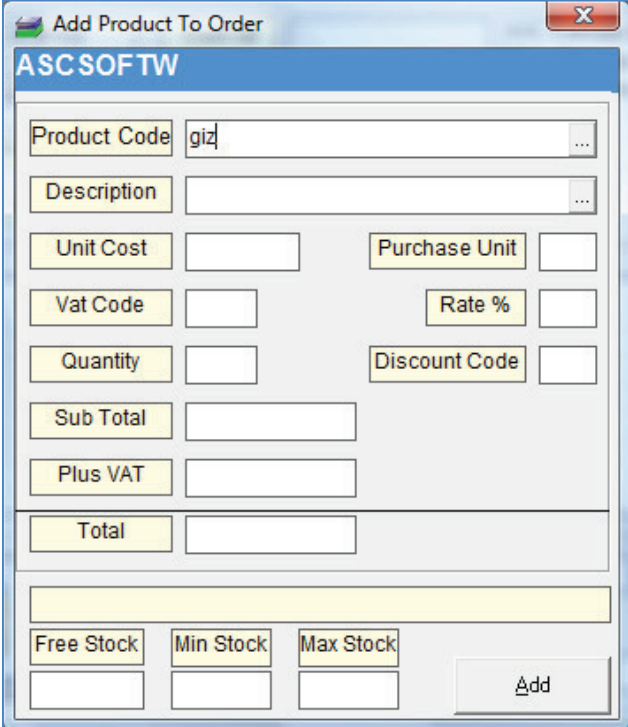
Grand Total

☐ Auto Receive Parts

Add Product

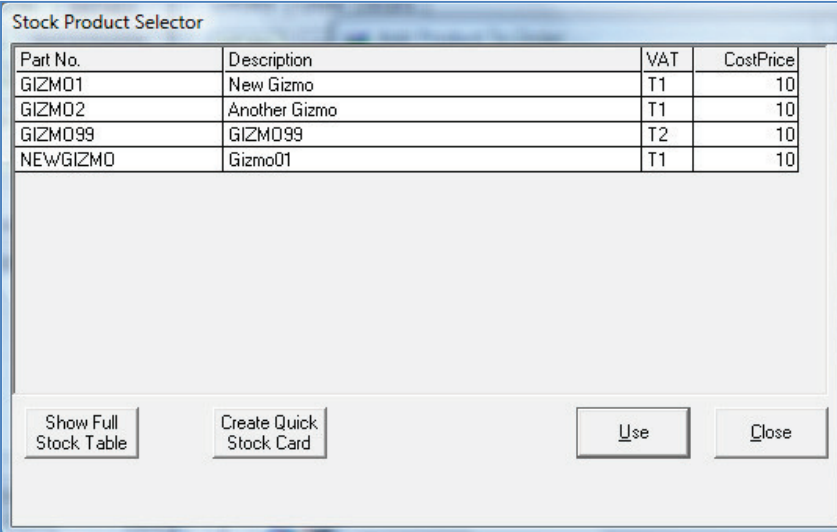
Type in all or part of the *Product Code*, or all or part of the *Description* and press **Enter**.

Alternatively, click on  at the end of the *Product Code* text box to display a full list of part from this supplier.



Part Number

A list of parts matching the search query will be displayed.



Part No.	Description	VAT	CostPrice
GIZM01	New Gizmo	T1	10
GIZM02	Another Gizmo	T1	10
GIZM099	GIZM099	T2	10
NEWGIZM0	Gizmo01	T1	10

Select Part

Select the part that you want to use and click on ***Use***.

Next, select the quantity of the part that you want to order for the job then click on ***Add***.

ASC SOFTWARE

Product Code: NEWGIZMO

Description: Gizmo01

Unit Cost: 10 Purchase Unit: 1

Vat Code: T1 Rate %: 15

Quantity: 1 Discount Code:

Sub Total: 10.00

Plus VAT: 1.50

Total: 11.50

Free Stock: 86 Min Stock: 1 Max Stock: 10

Add

Enter Quantity

The part will then be added to the Purchase Order.

Details | Order Details

AC No.: ASC SOFTWARE Cust Ref:

Date: 11/08/2009 Order No.: 106291

Purchase Discount Type:

Stock Depot: ASC Software (Ardee)

ASC Software Ltd
58 Le Broquay Avenue
Parkwest Industrial Park
Dublin 12

Part No	Qty	Price	Vat Code	Net	VAT	Gross
NEWGIZMO	1	10.00	T1	10.00	1.50	11.50

Add Product **Audit Trail**

Total: 10.00 1.50 11.50

Grand Total 11.50

Save **Close**

Part Added to PO

Click on **Add Product** to add another part on to the Purchase Order for this Job Card or click on **Save** to save and close the Purchase Order.

Note – the Purchase Order will remain with an open status until it is put *On Order*. For more details on this refer to the Purchase Order section.

View the Status of a Purchase Order on a Job Card

You can view the status of Purchase Orders on a Job Card by opening the Job Card and clicking on the *Orders* tab.

Job Card : 001373387

Activity Create Order Workshop Times Parts Report Spilt Job Card Sign Off Invoice

Registration No. 93D3503 Make Mazda Body Type Vehicle Category
Engine No. 987456 Model GALAXIE Stock No 0
VIN No. ZXC1234321 Mileage / KM 87000 Axles 0 Year of Manu 1993 Year 1st Reg 1993
Setup Date 11/08/2009 Completion Date Fleet No. ALANFLEET Vehicle Depot
Starting Order No. Closing Order No. n/a Dealer Warr Claim No
SONO Business Type

Labour / Parts | Instructions | Vehicle Details | Customer | Reports | Notes/SMS **Orders** | Scan Docs | Job Type | Faults | Job Audit |

Print... 100 % 1/1 Back Forward Full Report

Purchase Order Status 11/08/2009 15:03
Job Number: 1373387

POP No	Date	Supplier	Status
106291	11/08/2009	ASC Software Ltd	On Order

Part No	Description	Qty Ordered	Qty Recd.	Balance
NEWGIZMO	Gizmo01	1.00		

Status: Open Change
Save Close

Purchase Order Status

The *Purchase Order Status* report will be displayed containing the details and statuses of the Purchase Orders on the Job Card.

Click **Full Report** to view the report in full screen.

Clicking on the Purchase Order number (in blue) will take you directly to the Purchase Order.

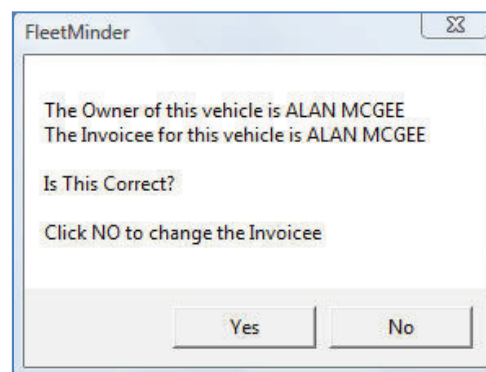
Change the Invoicee on a Job Card

To ensure all charges on the job card are billed to an invoicee that is different to the current, you should change the invoicee at the creation of the job card.

However, if you wish to charge only a few items to a different invoicee, you need to create the job card with the *default* invoicee as displayed in the *Invoice To* field and then individually change *Labour* and *Parts*. For a more comprehensive way to do this see the Job Card Split section.

Changing Invoicee at Creation of Job Card

If you are changing it from the start of a job card, click on **No** to indicate that you wish to change the invoicee.



Changing Invoicee

The Select Invoicee screen will then appear.

A screenshot of a software window titled "Select Invoicee for this Job Card". At the top, it says "Reg No.: 93D3503". The window is divided into two main sections. The left section, labeled "Vehicle Owner", contains several text input fields with the following text: "ALAN MCGEE", "Ardee Business Park", "Ardee", "C.o Louth", and "ALA08035". The right section, labeled "Invoice To", has a "Same as Owner" button and a text field containing "ASC Software -- AHS Installations". Below this are more text fields: "11/12 Westlink Ind. Est.", "Kylemore Road", "Dublin 10", and an empty field. At the bottom of the right section, there is a text field with "ASC07203" and a "Change Invoicee" button. At the bottom center of the window is a "Save" button. At the bottom right, there is a section labeled "Enter Search Details" with a text field containing "ascsoftware".

Search for New Invoicee

Type the search criteria of the preferred invoicee in the search box and press **Enter**.

Changing Invoicee during Job Card Lifespan

For a more comprehensive method on changing the invoicee see the section on Split Job Card.

After the job card has been created and an invoicee set, if you want to invoice someone other than the named invoicee, you need to allocate the invoicee to each of the *Labour* costs and *Part* costs individually.

In the Job Card, we can note that the current status is: **Alan McGee** owns the vehicle and the *Invoice To* is **ASC Group Ltd**.

Vehicle Owner		Invoice To	
ALAN MCGEE	ALA08035	ASC GROUP LTD	ASC07277
Ardee Business Park	CA0001	11/12 WESTLINK IND EST	CA0001
Ardee		KYLEMORE RD	
C.o Louth		DUBLIN	
		10	
Telephone		Telephone	
Fax		Fax	
Mobile		Mobile	

Vehicle Owner and Invoice To

On this job card, we currently have two lots of labour – ‘*Std Labour*’ and ‘*H/lamp Alignment*’. We also have two ‘*Wiper Blade*’ parts on the job card.

Labour Code	Description	Rate	Hours	Total	VAT Code
1101	Std Labour	45.00	1.00	45.00	T9
1250	H/lamp Alignment	50.00	0.50	25.00	T9

Part No	Description	Val Price	Qty	Total Cost	Total Sale	VAT Code
NEWGIZMO	Gizmo01	10.00	1	10.00	13.00	T9

Status:

Labour and Parts

Currently, this labour and parts will be charged to the invoicee as is named in *Invoice To* field by default.

However, if we wanted to charge the *H/lamp Alignment* to the owner of the vehicle, **Alan McGee** instead of the default invoicee **ASC Group**, we have to change it manually.

Double click on the item on which you wish to change the invoicee – in our example we double clicked on *H/lamp Alignment*.

[illegible]

Change the Invoicee

Next, double-click on the line below *Inv To*, to change the invoicee.

Edit Job Labour

Labour Code : 1250

Name	Alan McGee		Rate Per Hour
Date	11/08/2009	Add Instruction	50
34007	lighting system.		
Headlamp Alignment			

Start Time	End Time	Worked Time	Charged Time	Charge Value
00:00	00:00	0.00	0.50	25.00

Invoice To

Alan McGee

Set to Same as Vehicle Owner

ASC Software -- AHS Installations

11/12 Westlink Ind. Est.,

Kylemore Road,

Dublin 10

ASC07203

Save

Close

Enter the New Invoice Name

In the box underneath *Invoice To* type in the name of the customer you wish to make the invoice, in this case we have typed in **Alan McGee**.

You can type in all or part of the name. Press *Enter* when you have typed it and this will prompt a search.

Ref	Name
ALA09188	Alan McGee
ALA08035	ALAN MCGEE

Customer Search Results

Select the customer from the list by left clicking on it once.
Then click on **Use** button.

Labour Code : 1250

Name: Alan McGee Rate Per Hour: 50

Date: 11/08/2009 Add Instruction

34007: lighting system.

Headlamp Alignment

Start Time	End Time	Worked Time	Charged Time	Charge Value
00:00	00:00	0.00	0.50	25.00

Invoice To: [Set to Same as Vehicle Owner]

ALAN MCGEE

Ardee Business Park

Ardee

C.o Louth

ALA08035

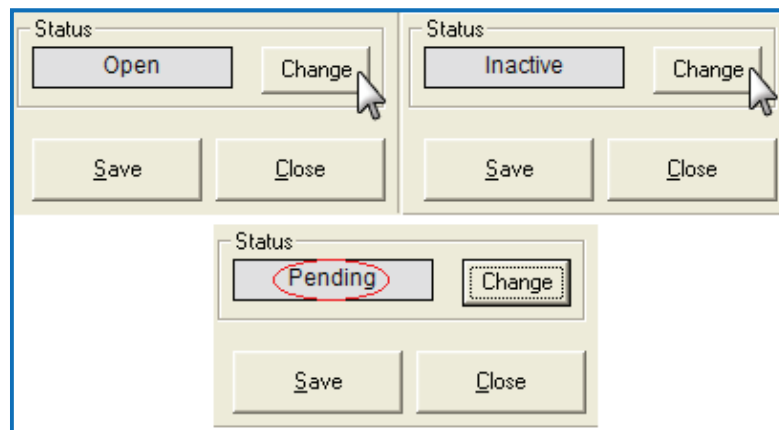
Save Close

New Invoicee

The new invoicee will be on display. Click on **Save**.

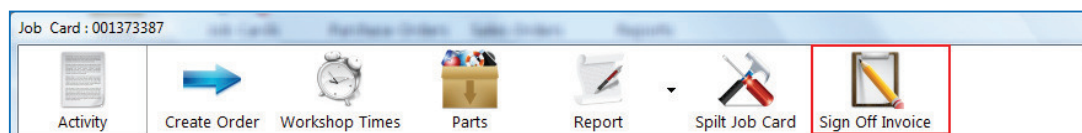
Sign Off a Job Card

To sign off a Job Card, the status must be changed to Pending.



Job Card Status

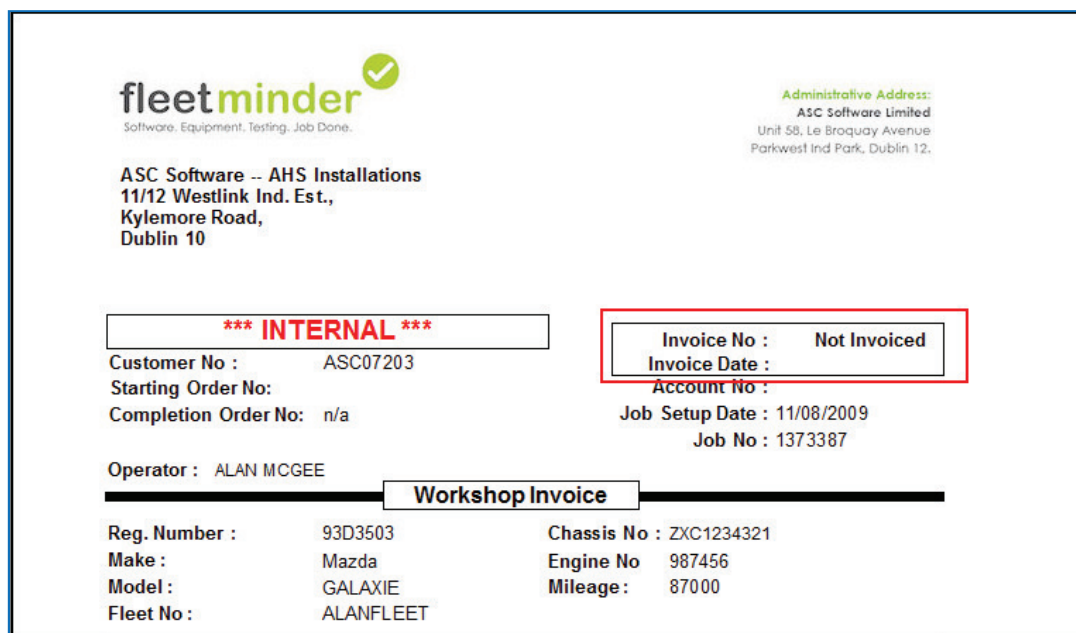
Click on **Sign Off Invoice**.



Sign Off Invoice

FleetMinder will then produce a Pro Forma invoice so that you can verify that the details are correct.

Note – the Invoice Number and Date are not displayed yet.



fleetminder ✓
Software. Equipment. Testing. Job Done.

ASC Software -- AHS Installations
11/12 Westlink Ind. Est.,
Kylemore Road,
Dublin 10

Administrative Address:
ASC Software Limited
Unit 58, Le Broquay Avenue
Parkwest Ind Park, Dublin 12.

*** INTERNAL ***

Customer No : ASC07203
Starting Order No:
Completion Order No: n/a


Operator : ALAN MCGEE

Invoice No : Not Invoiced
Invoice Date :
Account No :
Job Setup Date : 11/08/2009
Job No : 1373387

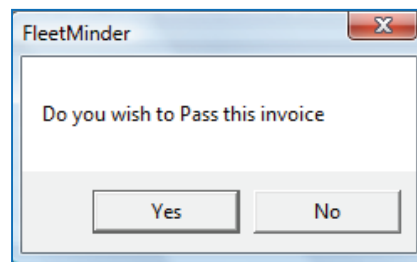
Workshop Invoice

Reg. Number : 93D3503 Chassis No : ZXC1234321
Make : Mazda Engine No 987456
Model : GALAXIE Mileage: 87000
Fleet No : ALANFLEET

Pro Forma Invoice – No Invoice Number

Click on the  in the top-right corner to close the visible invoice.

You will then be prompted to pass (sign off) the invoice.



Pass the Invoice

Click **Yes** to sign off the invoice or click **No** to return to the Job Card without signing off.

If you have passed the invoice then FleetMinder will display the Invoice.



Software. Equipment. Testing. Job Done.

ASC Software -- AHS Installations
11/12 Westlink Ind. Est.,
Kilemore Road,
Dublin 10

Administrative Address:
ASC Software Limited
Unit 58, Le Broquay Avenue
Parkwest Ind Park, Dublin 12.

***** INTERNAL *****

Customer No : ASC07203
Starting Order No:
Completion Order No: n/a

Invoice No : 5262
Invoice Date : 11/08/2009
Account No :
Job Setup Date : 11/08/2009
Job No : 1373387

Operator : ALAN MCGEE

Workshop Invoice

Reg. Number : 93D3503
Make : Mazda
Model : GALAXIE
Fleet No : ALANFLEET

Chassis No : ZXC1234321
Engine No : 987456
Mileage : 87000

Labour Details

Labour Code	Description	VAT	Time	Price	% Disc	Charge	Total
1101	Std Labour	T9	1.00	60.00	25.00	45.00	45.00
Total Labour Value							45.00

Parts List

PartNo	Description	VAT	Qty	Price	% Disc	Charge	Total
NEWGIZMO	Gizmo01	T9	1.00	20.00	0.00	20.00	20.00
Total Parts Value							20.00

Instruction List

Invoice

Note that the Invoice Number and Date have now been added to the Invoice.

Click **Print** to print out the Invoice.

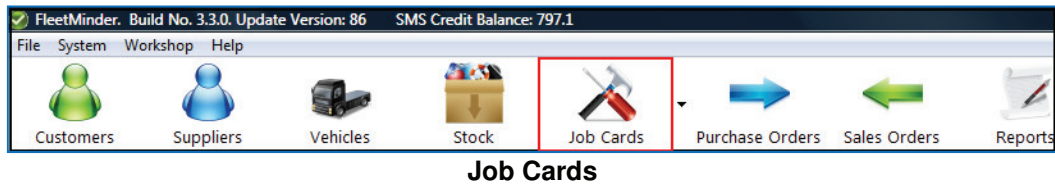
Alternatively, you can click **Email** or **Fax** to email or fax the invoice to the customer.

Click on the  in the top-right corner to close the invoice.

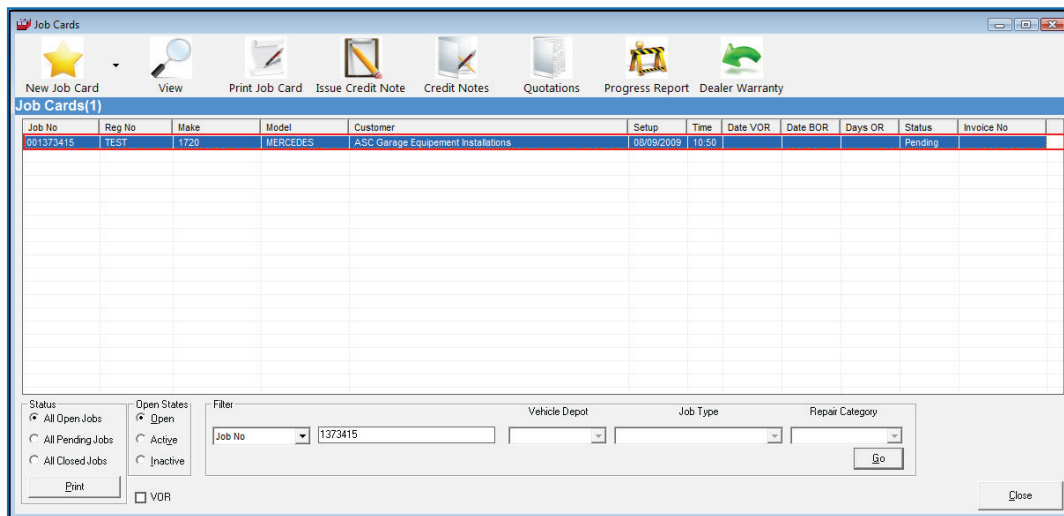
Note – the status of this Job Card will now have changed to Closed. To view this Job Card, click on **All Closed Jobs**. To view the invoice again, click on **Sign Off Invoice**.

Split Job Card

To split a job card to a new invoicee click on the **Job Cards** Section.

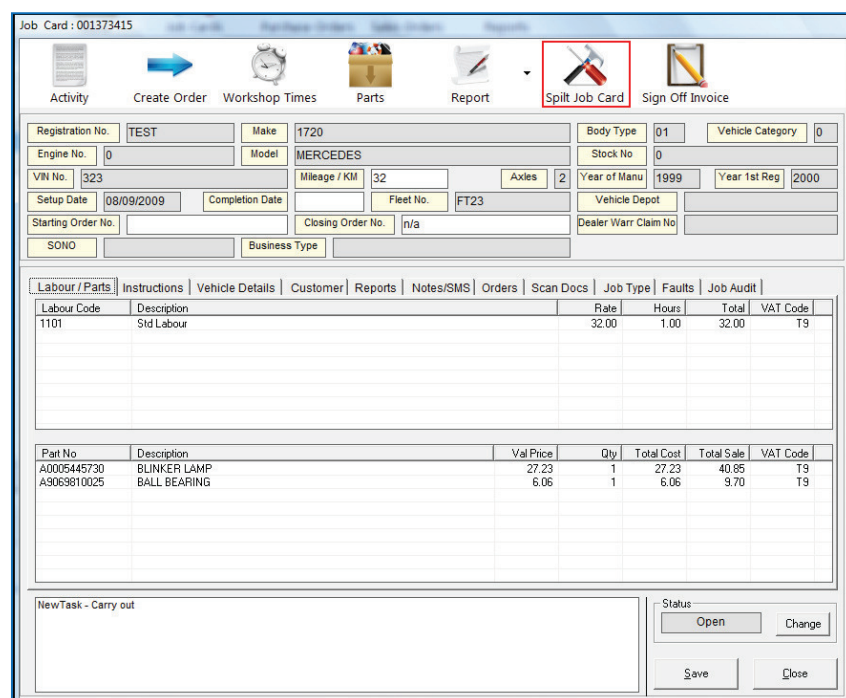


You then need to search for the job card that you want to split.



Job Card Search

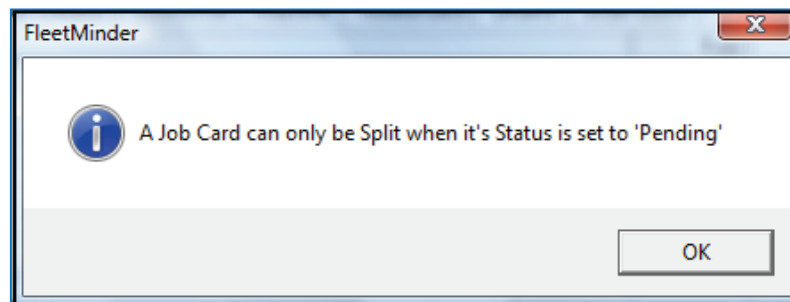
Once you have found the job, **Double Click** it and to open up the job card. You will then see the “**Split Job Card**” button at the top of the job card.



Split Job Card

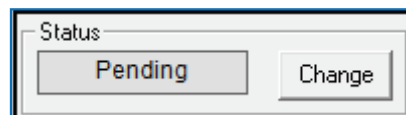
Click on ***Split Job Card***.

You may receive the following message:



Job Card 'Pending' Message

To set the status to pending click on ***Change***. This will change the status from ***Open*** to ***Pending***.



Pending Status

You can now click on the ***Split job card*** Button.

The following screen window will be displayed.

A screenshot of the "Split Job Card" window. At the top, it says "Job Number: 1373415". Below this is a tabbed interface with "Labour" selected. A table with the following columns is shown: Code, Employee, Date, Start, End, Worked, Charged, Invoicee, VAT, and VMRS. The first row is highlighted in red and contains: ☒, 1101, Alan McGee, 18/09/2009, 00:00, 00:00, 0.00, 1.00, ASC Garage Equipment Installations, T9. Below the table is a "Delete Line" button. At the bottom, there are input fields for "Registration No." (containing "TEST"), "Mileage / KM" (containing "32"), "Customer Starting Order No.", "Stock No.", "Customer Completion Order No." (containing "n/a"), and a "Close" button.

Job Card Split Labour

In the following sections you can split off **Labour**, **Parts** and **Instructions**.

In each section there is a tick box beside each labour line, part and instruction. To include these in the Split job card you need to tick the check box that corresponds to the **labour/part/instruction** you want split off.

Job Parts		
<input checked="" type="checkbox"/>	1	A0005445730 : BLINKER LAMP
<input checked="" type="checkbox"/>	1	A9069810025 : BALL BEARING

Job Card Part Split Parts

To Split off parts you need to click on the **Parts** Tab.

And as above you need to check each box that you want to split off from the jobcard.

Split Job Card		
Job Number: 1373415		
Labour Parts Instructions Summary		
Action Catg	Instruction	VMRS
<input checked="" type="checkbox"/> NewTask	Carry out	

Job Card Split Instructions

You can also split of Job Instructions, if you click on the instructions tab you then can check the box that corresponds to the instruction(s) that you want to split off.

Split Job Card

Job Number: 1373415

Labour | Parts | Instructions | **Summary**

Labour

Code	Employee	Date	Start	End	Worked	Charged
1101	Alan McGee	18/09/2009	00:00	00:00	0.00	1.00

Parts

PartNo	Date	Serial No	Qty	Val Price	% MU	Sale Price
A0005445730	18/09/2009		1.00	27.23	33.34	40.85
A9069810025	18/09/2009		1.00	6.06	37.53	9.70


Instructions

Action Catg	Instruction	VMRS
NewTask	Carry out	

Invoice To

asc group

Same as Owner

 Proceed Now

Registration No. TEST Mileage / KM 32 Customer Starting Order No. Customer Completion Order No. n/a

Stock No. Close

Job Card Split Summary

In the summary section you will see Labour, Parts and Instructions sections you have split from the job card.

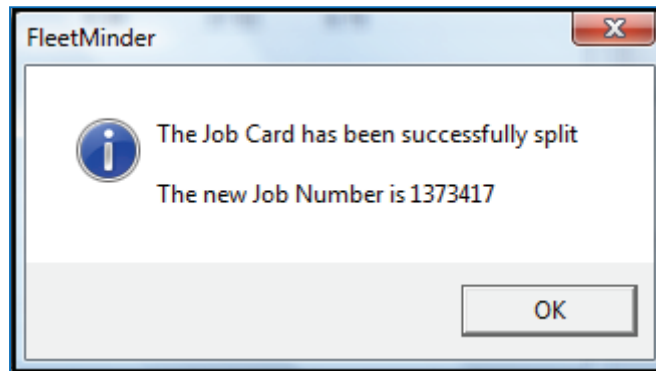
You can make an amendment by clicking on the relevant tab at the top of the screen.

On the summary screen you will also see the 'Invoice To' section.

You can select your invoicee.

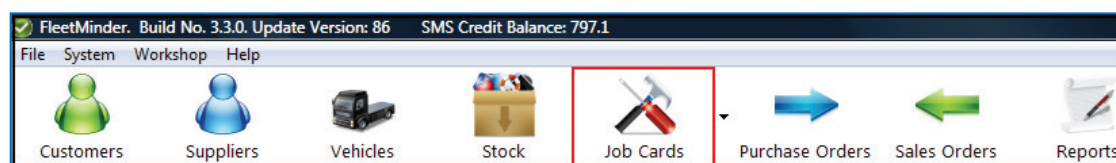
Click on the 'Invoice To' section

Type in the customer name and then press **Enter**.



Job Card Split New job Number

You will then receive the above message which includes the new job number.



Job Card Section

To open this new job you can go to the **Job Card** Section in the main menu and search for the new job number, in this case it is Job No: 1373417.

Job Card : 001373417

Activity Create Order Workshop Times Parts Report Spilt Job Card Sign Off Invoice

Registration No. TEST Make 1720 Body Type 01 Vehicle Category 0
 Engine No. 0 Model MERCEDES Stock No 0
 VIN No. 323 Mileage / KM 32 Axles 2 Year of Manu 1999 Year 1st Reg 2000
 Setup Date 18/09/2009 Completion Date Fleet No. FT23 Vehicle Depot
 Starting Order No. Closing Order No. n/a Dealer Warr Claim No
 SONO Business Type

Labour / Parts Instructions Vehicle Details Customer Reports Notes/SMS Orders Scan Docs Job Type Faults Job Audit

Labour Code	Description	Rate	Hours	Total	VAT Code
1101	Std Labour	60.00	1.00	60.00	T9

Part No	Description	Val Price	Qty	Total Cost	Total Sale	VAT Code
A0005445730	BLINKER LAMP	27.23	1	27.23	40.85	T9
A9069810025	BALL BEARING	6.06	1	6.06	9.70	T9

NewTask - Carry out

Status
 Open Change
 Save Close

New job Card

The New job card will now show all the labour, parts and instructions that have been split off.

Labour / Parts		Instructions		Vehicle Details		Customer		Reports		Notes/SMS		Orders		Scan Docs		Job Type		Faults		Job Audit			
Vehicle Owner						Invoicee						Credit Info											
ASC Garage Equipement Installations						ASC07788						ASC GROUP LTD						ASC07277					
58 Le Broquay Av.,						CA0001						UNIT 58 LE BROQUAY AVE						CA0001					
Parkwest ind Park												PARKWEST IND PARK											
Dublin 12												DUBLIN 12											
												IRELAND											
												10											
Telephone						6120922						Telephone						01 6120922					
Fax												Fax											
Mobile						353 2323						Mobile						087 6693090					
NewTask - Carry out																						Status	
																						Open	
																						Change	
																						Save	
																						Close	

To view the new invoicee click the '**Customer**' Tab.

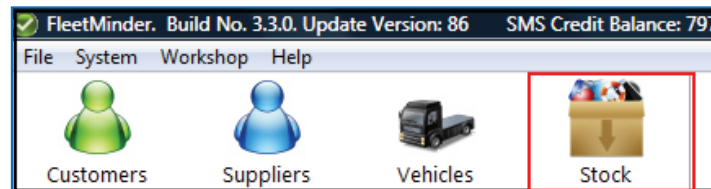
In this example you can see it has changed from ASC Garage to ASC Group.

The original job card will still be on the system, minus the parts / labour that were split off.

New Bill of Materials Job card

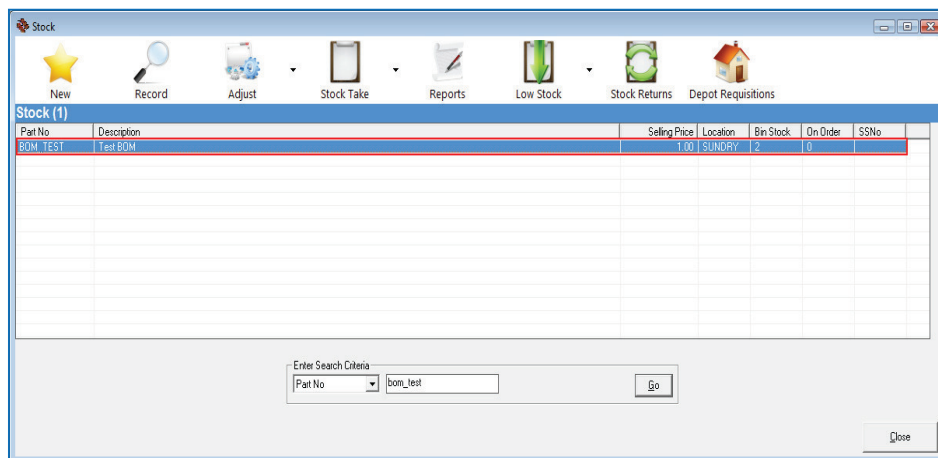
To create A Bill of Materials job card you will first have to assign a Stock Item as the Super Build of Materials Part.

To create the super BOM part you will need to click on the stock section on the main option bar. Then select the stock item that you want to assign as the super BOM part or alternatively create a brand new Stock item and set this as the super Bom part.



Stock Section

In the example below we have selected part no: Bom_Test
You will then need to double click on the stock item to open up the Stock record.



Stock Search

Within the stock record you will see a Super Bom Part checkbox.
To set this as the super Bom Part you will need to check this box.

You will then see a new Tab at the top called "Bill of Materials"

This is the section where you can add in your parts needed in order to manufacture the Bom Part.

Stock Record

BOM_TEST - Test BOM

Details | Intrastat | Sales | Notes | Suppliers | **Bill of Materials**

Part No. BOM_TEST
Description Test BOM
☒ Accumulate Running Quantity

Depot Totals

Depot	Location	Min	Max	On Ord	Bin
ASC Software...	SUNDRY	0.00	0.00	0.00	1.00

Grand Totals 0.00 1.00

+ Depot

Stock Group Stock Group 1
Sub Group Default

Purchase Price 1.00 Valuation Price 1.00
Unit 1
NL Desc. Parts For Resale

Selling Price 1.00 Rec Price 1.00
Unit 1 Always sell at VAT Code
NL Desc. Labour Sales

Purchase VAT VAT Desc. Temp VAT @ 15%

Supersession No
Exchange Unit

Serial No Req ☐ Allow Discount ☐ **is Super Part (BOM) ☒**
VOR Price 0.00 Discount Matrix

Warranty Period Months 0
Creation Date 08/04/2009

Save Close

Stock Record

Click on the '**Bill of Materials**' tab.

To add a part to your BOM click on "Add part".

You can then search for the part by either Part no or Description

Bill of Materials Add Part

Part No. A Description BOM_TEST

Description

Close

Bill of Materials Add Part

Once you have selected your part, you will need to put in the quantity required in this case we will put in 2.

Bill of Materials - Add Part

Parts for BOM Part No :

Part No: A BOM_TEST

Description: Part A

Bin Stock: 0

Location: DIRECT PART

Qty Required:

Save Close

Add Quantity

Click **Save** to Add Part.

You can also add an alternative part. This part will be used if the main part is out of stock. To add the alternative part click **Edit Alt Part**.

Stock Record

BOM_TEST - Test BOM

Details | Intrastat | Sales | Notes | Suppliers | Bill of Materials

Part No	Description	Qty	Alt Part No	Description	Seq
A	Part A	2	D	Part D	1
B	Part B	2	C	Part C	2
C	Part C	2	A	Part A	3
D	Part D	2			4

Add Part

Edit Part Edit Alt Part

Delete Part Delete Alt

Change Sequence

Save Close

Edit Alt Part

You will then get a section where you can search by Part no or Description.

Bill of Materials - Edit Alternative Part

Parts for BOM Part No :

Part No: AL001 AL001

Description: Alan Test

Current Part: AL001
Alan Test

Bin Stock: 0

Location: 4911

Save Close

Edit Alternative Part

Click **Save** to add alt part.

Stock Record

BOM_TEST - Test BOM

Details | Intrastat | Sales | Notes | Suppliers | Bill of Materials

Part No	Description	Qty	Alt Part No	Description	Seq
A	Part A	2	D	Part D	1
B	Part B	2	C	Part C	2
C	Part C	2	A	Part A	3
D	Part D	2	AL001	Alan Test	4

Add Part Edit Part Edit Alt Part Delete Part Delete Alt

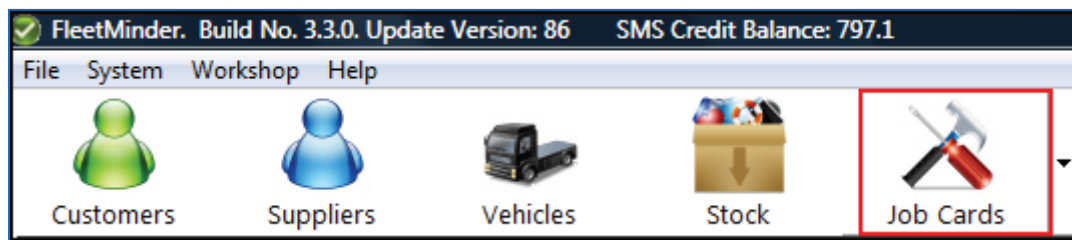
Change Sequence

Save Close

Alternative Part Added

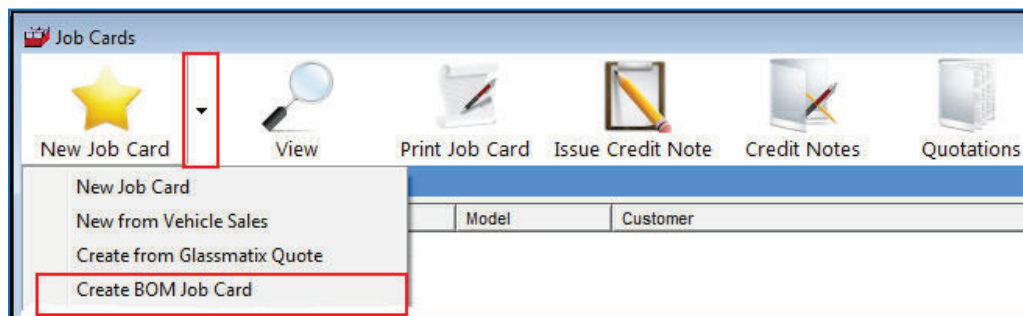
When you have completed setting up you BOM Part you can now setup the BOM job to build the Super BOM Part.

Click on **Job Cards**.



Job Card Section

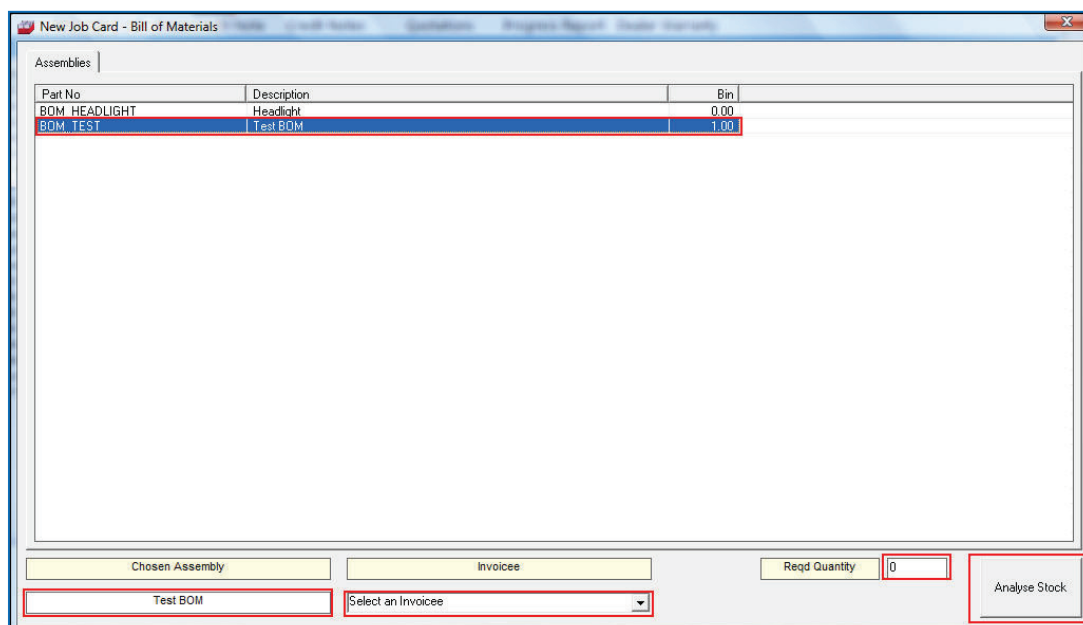
Click the drop down button beside '**New job Card**'.
You will then see "**Create BOM job Card**".



New Job Card Drop Down

Once clicked you will see the bill of materials assemblies screen. This will contain all BOM assemblies on the system.

You should see the BOM we set up "BOM_TEST". Click on "**BOM_TEST**"
This assembly and use the invoicee drop down box to select your invoicee, in this example we have used "**ASC Group LTD**".



BOM

Chosen Assembly: Test BOM

Invoice: ASC GROUP LTD

Reqd Quantity: 2

Analyse Stock

BOM Job Setup

Once you have chosen the assembly and have selected the invoicee you will have to enter the **Required Quantity**, in this example we have entered 2.

Chosen Assembly: TESTBOM

Invoice: ASC GROUP LTD

Reqd Quantity: 2

Analyse Stock

Required Quantity

Click on “**Analyse Stock**”

This will check the bin stock figures for you assembly and will show you your maximum production quantity from you current bin stock values.

Unit Qty	Req Qty	Part No	Description	Bin	Alt Part No	Alt Description	Alt Bin	Tot Bin	Short
1	2	A	Part A	1	D	Part D	1	2.00	-1
1	2	B	Part B	1	C	Part C	1	2.00	-1
1	2	C	Part C	1	A	Part A	1	2.00	-1
1	2	D	Part D	1	AL001	Alan Test	0	1.00	-1

Max Production Qty: 1.00

Reqd Quantity: 2.00

Analyse Stock

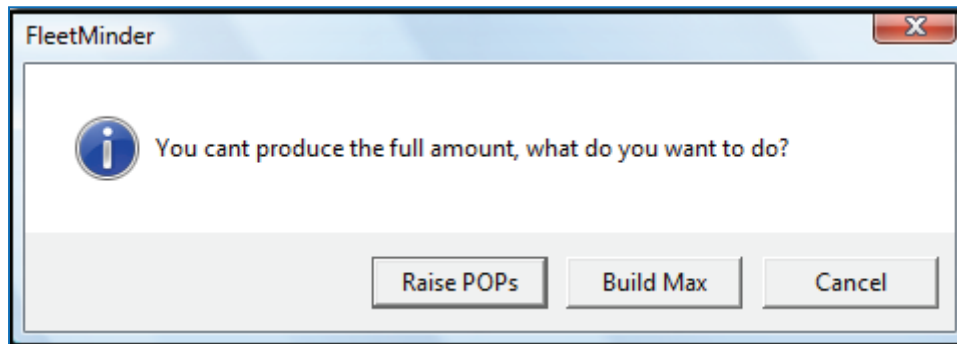
Bin Stock

In the below example the current bin stock for the parts is 1. Therefore it displays the maximum production quantity is 1.

With our example we said the required quantity was 2,

Click Create Job.

You will see the following window:



Insufficient Stock

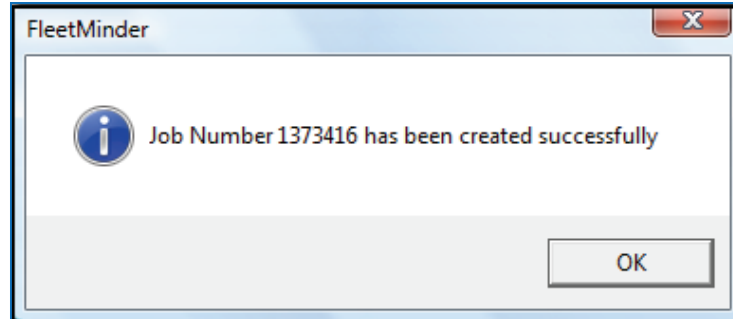
Raise POPs – This will raise purchase orders for the remaining parts allowing you to build the required quantity.

In this example it will raise a purchase order for parts a,b,c,d, ordering 1 for each.

Build Max – This will build your maximum production quantity that current bin stock levels will allow.

In this example it will build Max BOM of 1.

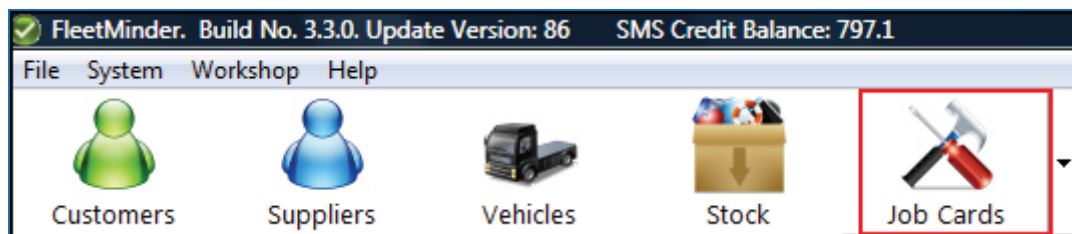
Click on build max and you will receive the following message.



Fleetminder Job Created

This has created job No: 1373416

To open this job you will need to go to the Job Cards section.



Job Card Section

Double Click on the new job.

Job Card : 001373416

Activity Create Order Workshop Times Parts Report Spilt Job Card Sign Off Invoice

Registration No. BOM_TEST Make WS-BOM Body Type Vehicle Category
 Engine No. Model Test BOM Stock No 0
 VIN No. BOM_TEST Mileage / KM 0 Axles 0 Year of Manu 2009 Year 1st Reg 2009
 Setup Date 18/09/2009 Completion Date Fleet No. Vehicle Depot
 Starting Order No. Closing Order No. n/a Dealer Warr Claim No.
 SONO Business Type

Labour / Parts Instructions Vehicle Details Customer Reports Notes/SMS Orders Scan Docs Job Type Faults Job Audit

Labour Code	Description	Rate	Hours	Total	VAT Code

Part No	Description	Val Price	Qty	Total Cost	Total Sale	VAT Code
A	Part A	1.00	1	1.00	1.00	T9
B	Part B	1.00	1	1.00	1.00	T9
C	Part C	1.00	1	1.00	1.00	T9
D	Part D	1.00	1	1.00	1.00	T9

Free Text - Manufacture 1 of BOM_TEST : Test BOM

Status

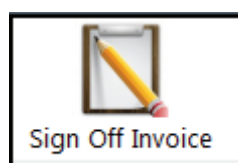
BOM Job Card

You can then add labour (or more parts) to the job. Once it has been completed click **Change** to change the status to Pending.

Status

Pending

Click **Sign off Invoice**



Sign Off

Sign off as you would with a standard job card, before you complete the sign off process you will see the following window.

Bill of Materials

Please confirm the quantity of assemblies that were manufactured

1

Confirm Quantity

This window appears to confirm the quantity of assemblies manufactured.


Software, Equipment, Testing, Job Done.

Administrative Address:
ASC Software Limited
Unit 58, Le Broquay Avenue
Parkwest Ind Park, Dublin 12.

ASC GROUP LTD
UNIT 58 LE BROQUAY AVE
PARKWEST IND PARK
DUBLIN 12
IRELAND
10

***** INTERNAL *****

Customer No : ASC07277
Starting Order No:
Completion Order No: n/a

Invoice No : 5263
Invoice Date : 31/08/2009
Account No : CA0001
Job Setup Date : 31/08/2009
Job No : 1373404

Operator : ASC GROUP LTD

Workshop Invoice

Reg. Number : BOM_TEST
Make : WS-BOM
Model : Test BOM
Fleet No :

Chassis No : BOM_TEST
Engine No
Mileage: 0

Labour Details

VRMS Code	Description	VAT	Time	Price	% Disc	Charge	Total
Total Labour Value							

Parts List

PartNo	Description	VAT	Qty	Price	% Disc	Charge	Total
A	Part A	T9	1.00	1.00	0.00	1.00	1.00
B	Part B	T9	1.00	1.00	0.00	1.00	1.00
C	Part C	T9	1.00	1.00	0.00	1.00	1.00
D	Part D	T9	1.00	1.00	0.00	1.00	1.00
Total Parts Value							4.00

Instruction List

Free Text

Manufacture 1 of BOM_TEST : Test BOM

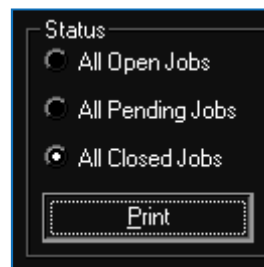
Fleetminder BOM Invoice

Once completed you will see the invoice.

BOM_Test bin stock will now increase by 1 in FleetMinder.

Issue Credit on Parts or Labour on a Job Card

You can only issue credit on *Closed* Job Cards.

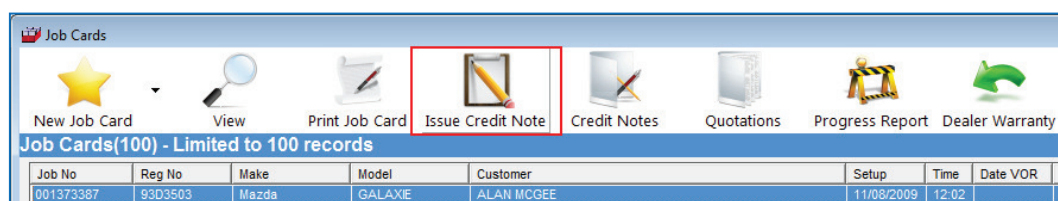


All Closed Jobs

Select the *All Closed Jobs* option button.

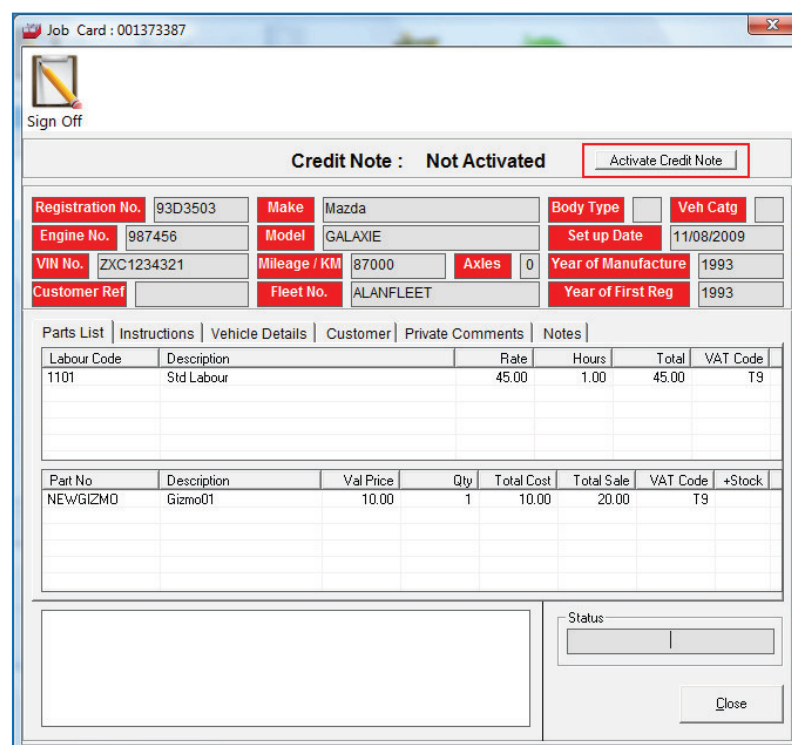
This will display all the closed jobs within your system.

Select the job that you wish to issue credit to and then click on the **Issue Credit** button.



Issue Credit

The un-activated Credit Note will then appear.



Sign Off

Credit Note : Not Activated [Activate Credit Note](#)

Registration No.	93D3503	Make	Mazda	Body Type		Veh Catg	
Engine No.	987456	Model	GALAXIE	Set up Date	11/08/2009		
VIN No.	ZXC1234321	Mileage / KM	87000	Axles	0	Year of Manufacture	1993
Customer Ref		Fleet No.	ALANFLEET	Year of First Reg	1993		

Parts List | Instructions | Vehicle Details | Customer | Private Comments | Notes

Labour Code	Description	Rate	Hours	Total	VAT Code
1101	Std Labour	45.00	1.00	45.00	T9

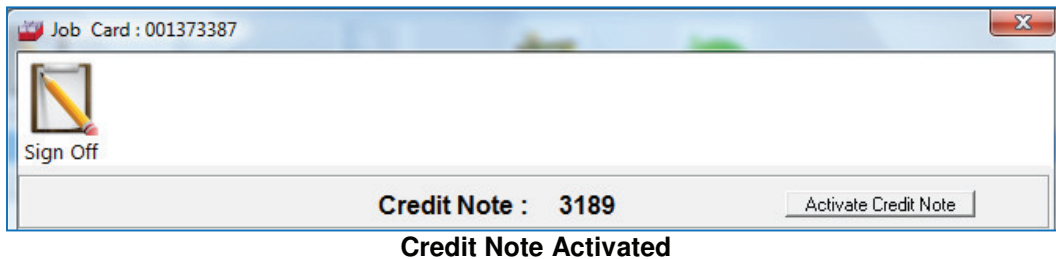
Part No	Description	Val Price	Qty	Total Cost	Total Sale	VAT Code	+Stock
NEWGIZMO	Gizmo01	10.00	1	10.00	20.00	T9	

Status:

[Close](#)

Credit Note

Click **Activate Credit Note** button when you are sure that this is the correct Job Card to which you want to issue credit.



Job Card : 001373387

Sign Off

Credit Note : 3189

Activate Credit Note

Credit Note Activated

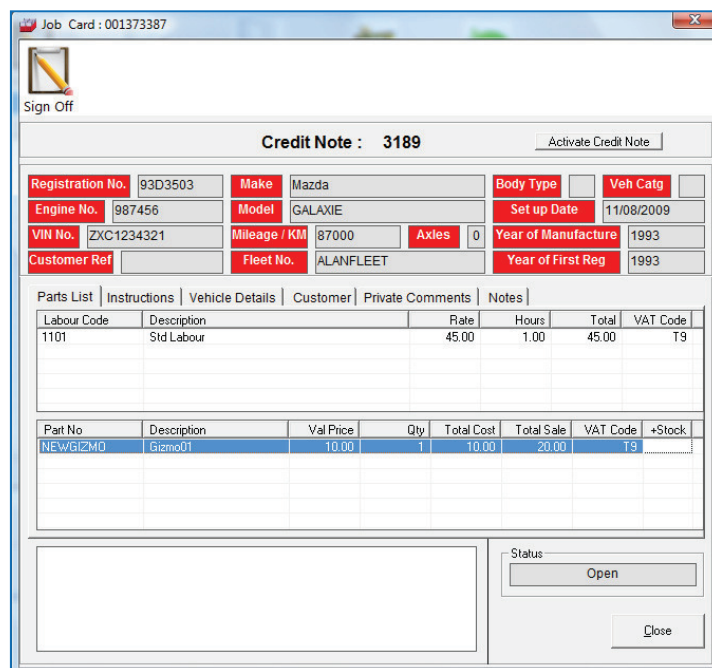
Once this is clicked, the note is activated and the *Credit Note* number is displayed. In this example, the *Credit Note number* is 3164.

You can credit the whole Job Card, or you can go into each item and adjust them manually.

All the items on display are the items, quantities and prices that were issued on the original invoice.

In this example, we only want to give credit on:

NewGizmo Qty – 1 Total Sale – 20.00.



Job Card : 001373387

Sign Off

Credit Note : 3189

Activate Credit Note

Registration No.	93D3503	Make	Mazda	Body Type		Veh Catg	
Engine No.	987456	Model	GALAXIE	Set up Date	11/08/2009		
VIN No.	ZXC1234321	Mileage / KM	87000	Axles	0	Year of Manufacture	1993
Customer Ref		Fleet No.	ALANFLEET	Year of First Reg	1993		

Parts List | Instructions | Vehicle Details | Customer | Private Comments | Notes

Labour Code	Description	Rate	Hours	Total	VAT Code
1101	Std Labour	45.00	1.00	45.00	T9

Part No	Description	Val Price	Qty	Total Cost	Total Sale	VAT Code	+Stock
NEWGIZMO	Gizmo01	10.00	1	10.00	20.00	T9	

Status: Open

Close

Selecting Part for Credit

So we first of all, double click on the selected item (Part or Labour) for which you wish to provide a credit note. This will open a credit note section, which allows you to enter the value for which you want to give credit, that is, the amount by which you want to reduce the original invoice.

Edit Credit Note Parts

Credit Note : 003189

Part No.	NEWGIZMO		
Description	Gizmo01		
VAT Code	T9	0.00	
Sale Price	20.00		
Qty	1.00		
Total	20.00		

Please note.
Enter the value that you want to give credit for; that is, the amount by which you want to reduce the invoice

Add to Stock ☐ Save Cancel

Credit Amount

In this example, the *Sales Price* was 20.00 and the *QTY* was 1.

As we want to completely credit this amount, we leave both values (reducing the previous invoice value by that amount.)

If you had 4 NEWGIZMO's on the invoice and wanted to give credit for 1, then the credit note would be issued for a *QTY* of 1; which fundamentally means that the customer was invoiced for only 3 NEWGIZMO's.

If you are crediting a part and want to add it back into stock, tick the **Add to Stock** button and this will bring the quantity of that part in stock back up by the appropriate amount.

Then click **Save**.

Part No	Description	Val Price	Qty	Total Cost	Total Sale	VAT Code	+Stock
NEWGIZMO	Gizmo01	10.00	1	10.00	20.00	T9	Yes

Add to Stock

As you have added the part or labour into the credit note, you will see the appropriate adjustment on the credit note.

In this case, the part, *NEWGIZMO*, has been credited back into stock, which can be seen under the *+Stock* header, where it has the value *Yes*, denoting the return of the part into stock.

To Ensure Credit is Not Issued

In this example, we do not want to credit the customer anymore items. Double click on *NEWGIZMO* and in the *Edit Credit Note Parts* section, change the *Sale Price* and *QTY* to *0.00* and *0*. This will result in *0.00* of credit being given on that item – i.e. NO credit and the customer will be charged for this item.

The image displays two side-by-side screenshots of the 'Edit Credit Note Parts' window for Credit Note 003189. Both windows show the same fields: Part No. (NEWGIZMO), Description (Gizmo01), VAT Code (T9), and a VAT amount of 0.00. A red note in both windows states: 'Please note. Enter the value that you want to give credit for; that is, the amount by which you want to reduce the invoice'.

Left Screenshot (Initial State):

Field	Value
Part No.	NEWGIZMO
Description	Gizmo01
VAT Code	T9
VAT Amount	0.00
Sale Price	20.00
Qty	1.00
Total	20.00

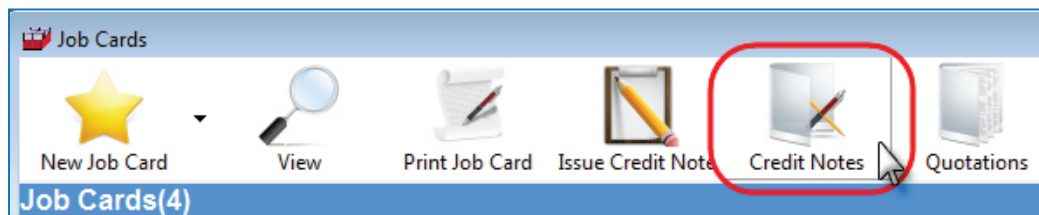
Right Screenshot (Modified State):

Field	Value
Part No.	NEWGIZMO
Description	Gizmo01
VAT Code	T9
VAT Amount	0.00
Sale Price	0.00
Qty	0.00
Total	0.00

Item Not Credited

View Credit Notes

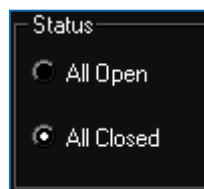
Within the *Job Cards* section, click on **Credit Notes** button.



Credit Notes

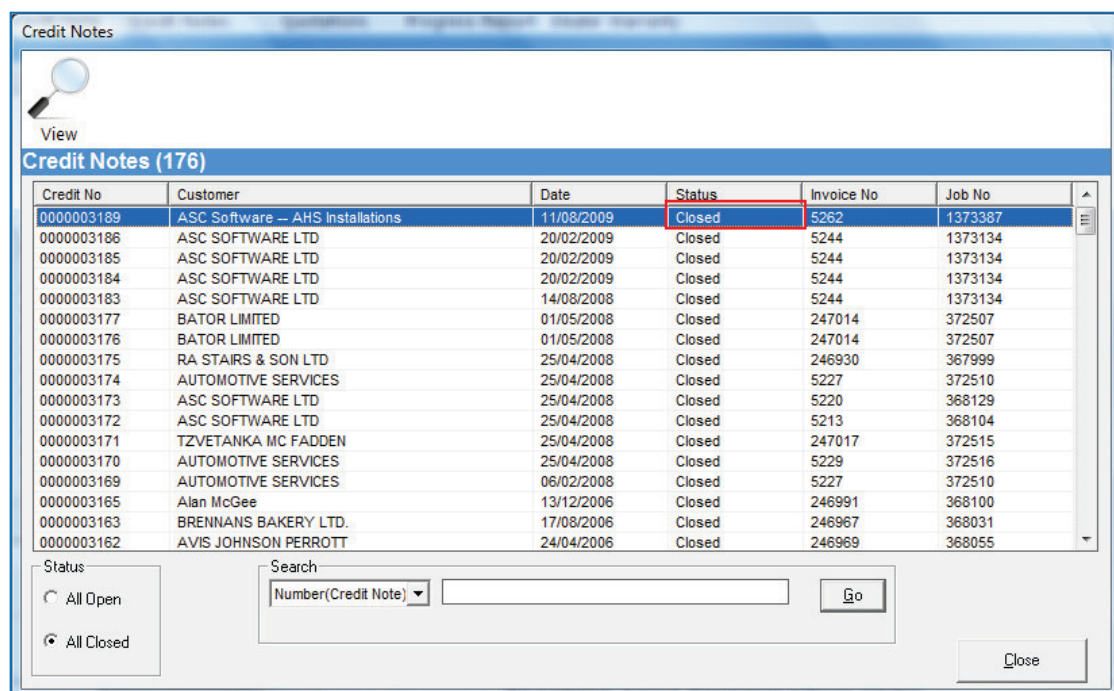
By default, all the closed credit notes appear first.

If you are looking at the open credit notes then click once on the **Status: All Closed** option. All the Credit Notes will refresh automatically, displaying only the closed ones.



Status

To open one of the credit notes either **Double Click** on it or else left click once on the credit note you want to open and click **View** button.



Closed Credit Notes

Print out a Workshop Credit Note

Click **Job Cards**.

Click **Credit Notes**.

Find the credit note, either by *Status* – **All Open** / **All Closed** and then scrolling through the list for the note, or by using the search criteria and then click on it to highlight it and then click **View**.

If the Credit Note is Closed

Click **Sign off Credit Note**.

Job Card : 1373387

Sign Off

Credit Note : 3189 Activate Credit Note

Registration No.	93D3503	Make	Mazda	Body Type		Veh Catg	
Engine No.	987456	Model	GALAXIE	Set up Date	11/08/2009		
VIN No.	ZXC1234321	Mileage / KM	87000	Axles	0	Year of Manufacture	1993
Customer Ref		Fleet No.	ALANFLEET	Year of First Reg	1993		

Parts List | In

Labour Code
1101

Part No
NEWGIZMO

Gizmo01

10.00

0

0.00

0.00

T9

+Stock

No


VAT Code
T9

OK

Sign Off a Second Time

A message will appear, notifying you that this credit note has already been signed off and cannot be signed off again.

Click **OK** to this message.



fleetminder
Software. Equipment. Testing. Job Done.

Administrative Address:
ASC Software Limited
Unit 58, Le Broquay Avenue
Parkwest Ind Park, Dublin 12.

ASC Software -- AHS Installations
11/12 Westlink Ind. Est.,
Kylemore Road,
Dublin 10

Customer No : ALA08035
Account No :
Job No : 1373387
Job Setup Date : 11/08/2009
Customer Order No :

Credit Note 3189
Invoice Date 11/08/2009
Invoice No. 0

Workshop Credit Note

Reg. Number : 93D3503
Make : Mazda
Model : GALAXIE

Chassis No : ZXC1234321
Engine No : 987456
Mileage : 87000

Labour Details


Labour Code	Description	VAT	Qty	% Disc	Price	Total
1101	Std Labour	T9	1.00	0.00	45.00	45.00
Total Labour Value						45.00

Parts List

Part No	Description	VAT	Qty	Price	% Disc	Price	Total
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Workshop Credit

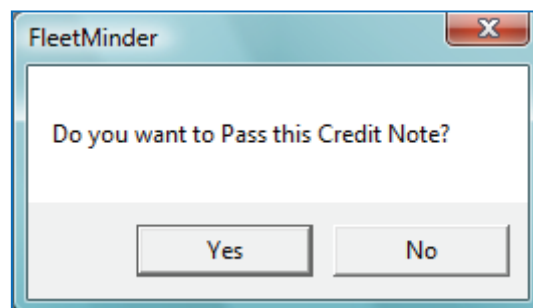
A *Workshop Credit Note* will appear and can be viewed or printed.

When you have finished, click the  in the top right corner.
Then click **Close** on the credit note.

If the Credit Note is Open

Click **Sign off Credit Note**.

First the Pro Forma Credit Note will then be displayed. If you are satisfied with the details then click the .



Click **Yes** to complete and display the credit note or click **No** to go back without completing the credit note.